CalSAWS

California Statewide Automated Welfare System

Design Document

CA-51740

DDCR 5091: Lobby Management Customer Lobby Monitoring System

CalSAWS	DOCUMENT APPROVAL HISTORY	
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DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/09/2020	1.0	Initial	Erika Kusnadi-Cerezo
11/12/2020	2.0	Design Clarification. Security Udpates (Section 2.6.5 and 2.6.6) was updated to reflect correct Rights to Group mapping and also added a new Security Group Information remove	Erika Kusnadi-Cerezo
12/7/2020	3.0	Added another Assumption that changes to the LA Lobby App will not be part of this design, Added to section 2.1.3 to have Lobby Monitor Call status be returned when user is filtering for All or Waiting To Be Seen on the Customer Status field. Lastly. Figure 2.2.4 was updated to match the design and Figure 2.2.6 was removed along with Section 2.2.3#2D to add the Location information display on the tooltip in order to match CIV existing functionality.	Erika Kusnadi-Cerezo
12/9/2020	4.0	Updated the Waiting Status on the Appendix Status. Message Center does not display when Reception Log is in Waiting Status.	Erika Kusnadi-Cerezo
12/10/2020	5.0	Updated Appendix section to be more detailed on what should be displayed in Message Center based on how the status got updated.	Erika Kusnadi-Cerezo
12/24/2020	6.0	Content Revision 2 • Added to Section 2.8.3 Description of Changes the following: o The order in which the Office promotion being display may change and not match with how it is being listed on the Lobby Monitor detail	Erika Kusnadi-Cerezo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		page. o Add that the Location information being display and the audio being call for the Lobby Monitor is based on the customer's language preferences. o Added the Lobby facing monitor resolution size. o Added that Lobby Monitor will need to be refreshed or restarted in order to display updates made on the Lobby Monitor Detail page. • Added the Language Preference Matrix to the Appendix Section.	
1/4/2021	7.0	Updated Maximum character for Custom Header from 80 to 50 in Section 2.6.6 and the Custom Header is only available in English.	Erika Kusnadi-Cerezo

Table of Contents

1 OVERVIEW

The Lobby Monitoring system allows county offices to call up customers by using a visual and audio support system on dedicated monitors in their lobbies. The county may also use the lobby monitors to displays alerts and promotions.

1.1 Current Design

The C-IV system allows county offices to call up customers by using visual and audio support system on dedicated monitors in their county offices lobbies. This is achieved by adding additional functionalities in message center and the Reception Log Detail page along with creating a Lobby Monitor page that allows users to view or update the Lobby Monitor for each office. These specific functionalities currently do not exist in the LRS/CalSAWS system.

1.2 Requests

Update the LRS/CalSAWS system so that it can communicate to the dedicated lobby monitors in each county offices that will allow the workers to call up customers by using a visual and audio support systems.

1.3 Overview of Recommendations

1. Update the Reception Log (Reception Log List page and the Reception Log Detail page) pop up window to allow users the ability to maximize the application window.
2. Update the Reception Log Detail page to allow workers to update the reception log status to Lobby Monitor Call.
3. Update Message Center to allow workers to update the reception log status to Lobby Monitor Call.
4. Create a new page that will allow county workers to manage the county office's lobby monitors and ability to call up customers by using a visual and audio support system.

1.4 Assumptions

1. Reception Log pop up window (Reception Log List page and the Reception Log Detail page) will continue to open to the existing size that the LRS/CalSAWS system currently have set.
2. Hide From Monitor functionality will continue to function as it does currently.
3. Fields that are not mentioned will retain existing functionality unless mentioned in the description of changes.
4. Changes to the Los Angeles Lobby Check-In Application to accommodate the new Lobby Monitor functionality will not be included as part of this SCR.

2 RECOMMENDATIONS

Update the LRS/CalSAWS system to have the ability to maximize the Reception Log pop up window and the ability to communicate to the participants within the county offices that have a dedicated lobby monitor. This will allow the workers to call up the customers by using a visual and audio support system via these dedicated monitors.

2.1 Reception Log List/Detail Pop-up Window

2.1.1 Overview

Update the Reception Log List/Detail pop-up window that will allow users the ability to maximize the application window.

2.1.2 Reception Log List/Detail Pop-up Window Mockup

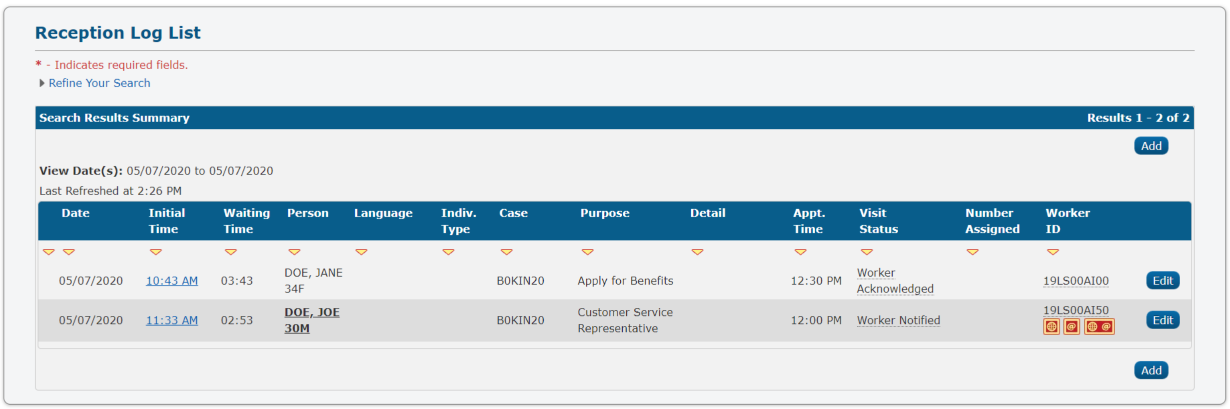

Figure 2.1.1 – Reception Log List page

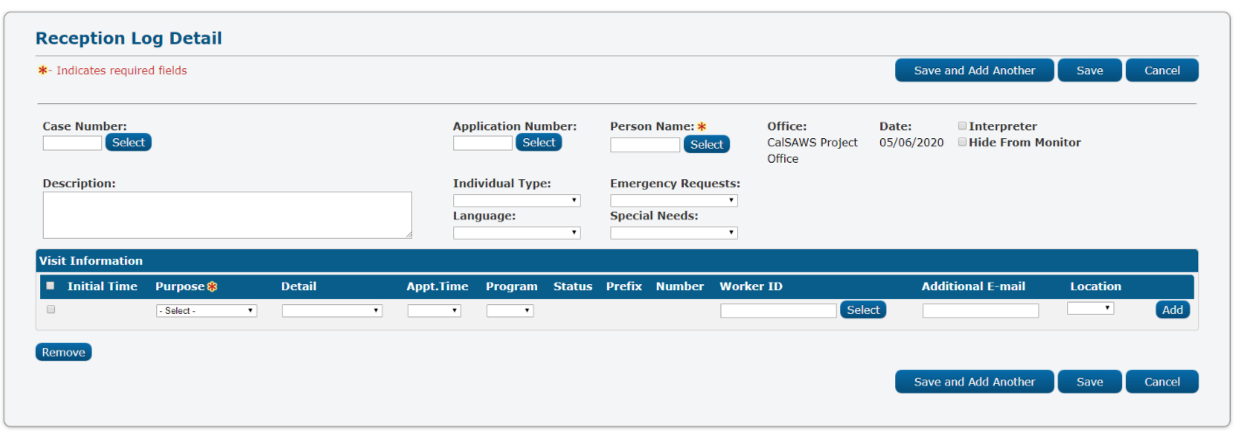

Figure 2.1.2 – Reception Log Detail page

2.1.3 Description of Changes

1. Update the Reception Log List/Detail pop-up window to allow users to maximize and minimize the Reception Log List/Detail pop-up window as shown on Figure 2.1.1 and Figure 2.1.2.
2. Update Reception Log List to return 'Lobby Monitor Call' status on the Search Results Summary block when the 'Customer Status' field is set to 'All' or 'Waiting To Be Seen'.

Note: Reception Log pop up window (Reception Log List page and the Reception Log Detail page) will continue to open to the existing size that the LRS/CalSAWS system currently have set.

2.1.4 Page Location

- **Reception Log Link located on the LRS Homepage**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Reception Log Detail page

2.2.1 Overview

Update the Reception Log Detail page to allow workers to update the reception log status to Lobby Monitor Call and a new field titled "Location".

2.2.2 Reception Log Detail page Mockup

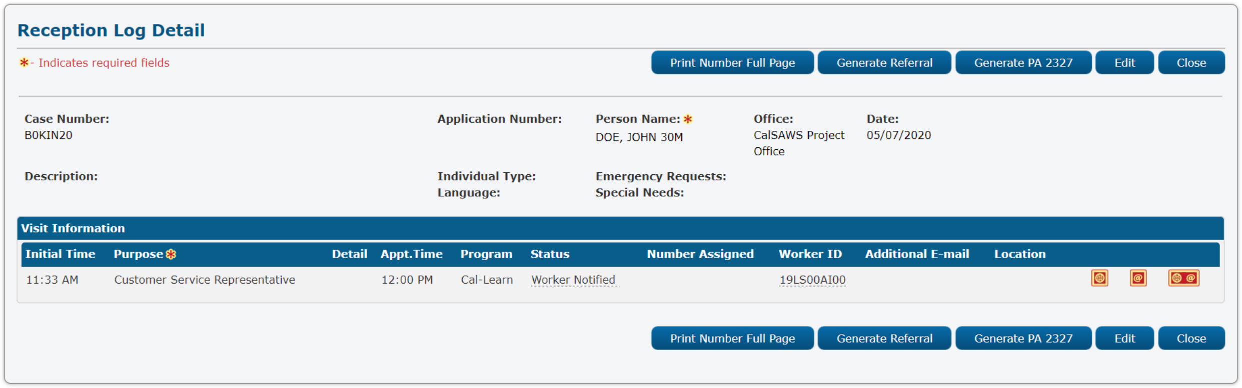

Figure 2.2.1 – Reception Log Detail Page 'View' Mode

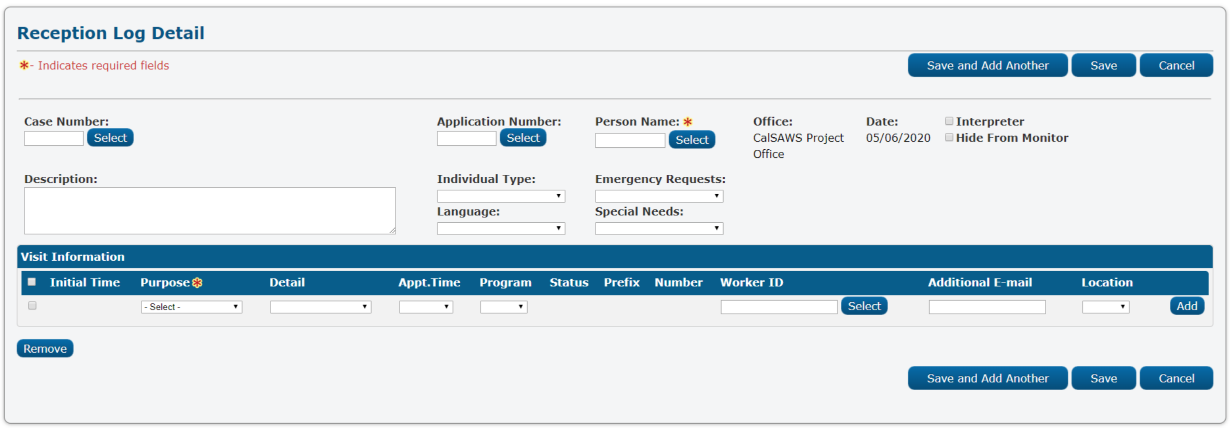

Figure 2.2.2 – Reception Log Detail Page 'Create' Mode with office set up with 'Location' information.

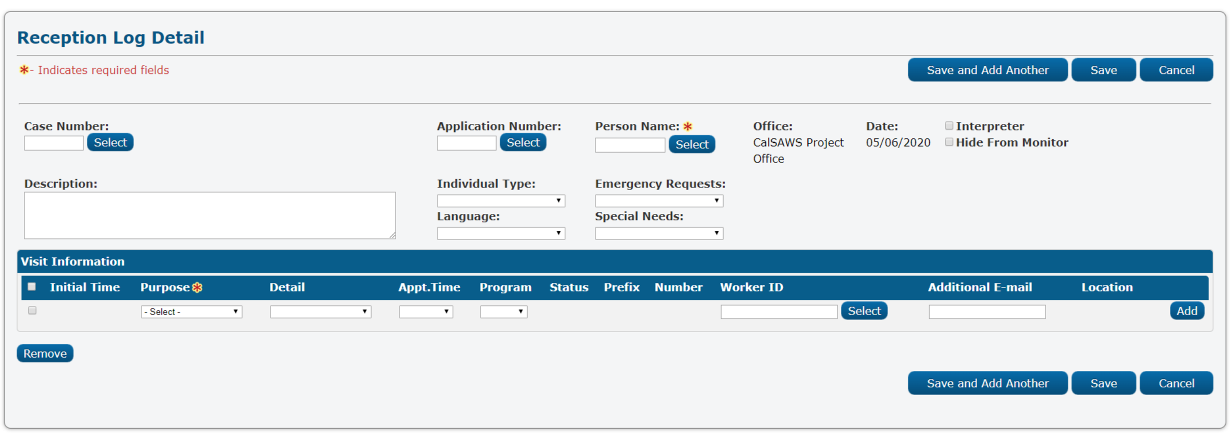

Figure 2.2.3 – Reception Log Detail Page 'Create' Mode without office set up with 'Location' information.

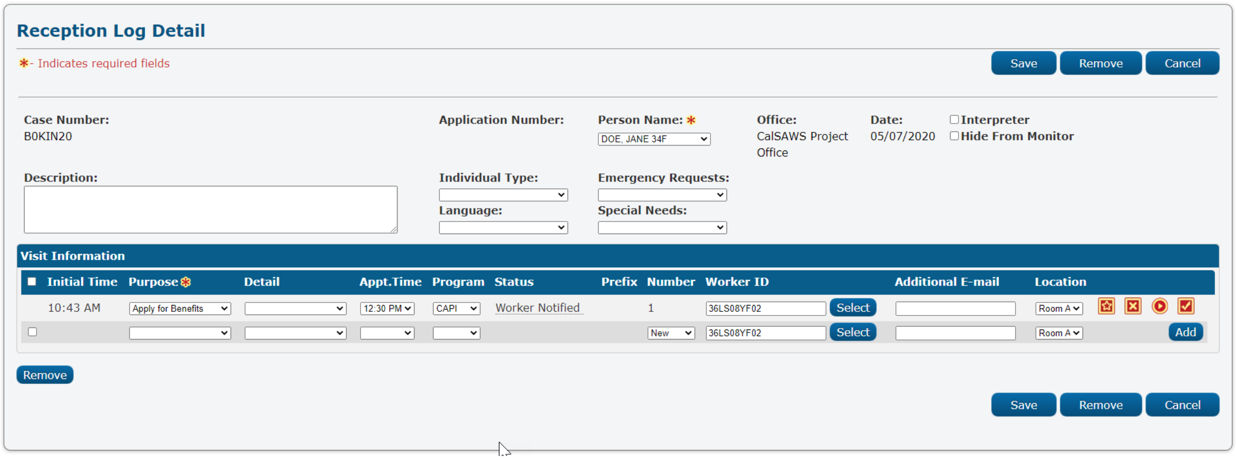

Figure 2.2.4 – Reception Log Detail Page 'Edit' Mode with office set up with 'Location' information.

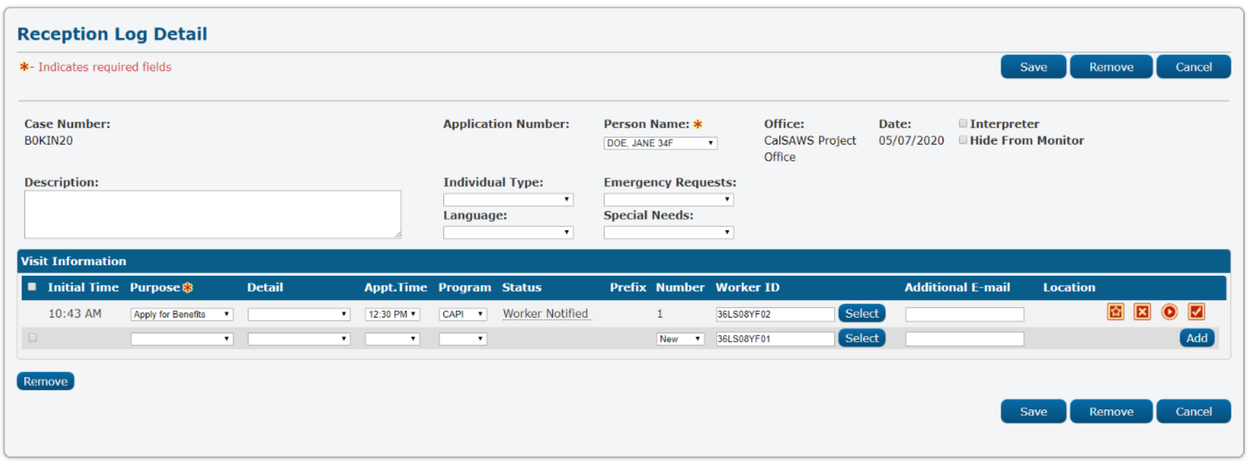

Figure 2.2.5 – Reception Log Detail Page 'Edit' Mode without office set up with 'Location' information.

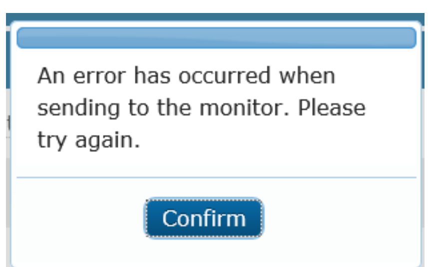

Figure 2.2.6 – Error pop up when not able to communicate to Lobby Monitor.

2.2.3 Description of Changes

1. Update the required icon on the 'Purpose' column to match all the other required icons.
2. Update the Reception Log Detail page with a new Column titled 'Location' as shown in Figure 2.2.1 through Figure 2.2.5

a. Value under the ‘Location’ drop down field will be based on the information that is inputted in the ‘Reception Locations’ section in the ‘Lobby Monitor Detail’ page (please see section 2.6 for further information).
b. The new column titled ‘Location’ will not have a location drop down (as shown on Figure 2.2.3 and Figure 2.2.5) if the office is not set up with ‘Location’ information through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor pages).
c. The new column titled ‘Location’ will display with a list of location(s) (as shown on Figure 2.2.2 and Figure 2.2.4) that the visit can take place within the office. This applies only to office(s) where ‘Location’ information through the Lobby Monitor Detail page is set up (see Section 2.6 of this design document for details on the new Lobby Monitor pages).
    i. Drop down value for ‘Location’ will display ‘blank’ followed by the list of ‘location’ information inputted from the Lobby Monitor Detail page in alphabetical order.
        1. The last location that was selected will be set as the default so the worker will not have to reset their location each time, they call a customer.

3. Add a new icon titled ‘Monitor Call’ icon as shown on Figure 2.2.2 and Figure 2.2.3.
    a. The ‘Monitor Call Icon’ will not display if the office does not have ‘Location’ information set up through the Lobby Monitor Detail page (see Section 2.6 of this design document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
    b. For offices that have ‘Location’ information set up , the ‘Monitor Call’ icon will display after the reception log entry has been created, it will be visible when the Reception Log Detail is in ‘Edit’ mode, and it’ll be the first icon listed right next to the ‘Location’ drop down field.
        i. Once the ‘Monitor Call’ icon is clicked, the icon will display darker so that the worker will know that it’s been clicked.
        ii. Once the location is selected and the ‘Monitor Call’ icon is click, upon clicking the ‘Save’ button the reception log entry status will be updated to ‘Lobby Monitor Call’ status.
        iii. If the worker clicks on the ‘Monitor Call’ icon again and save it, another status will be logged and will display as another row in tooltip.
        iv. The ‘Monitor Call’ icon will no longer display once the worker clicks the ‘X’ icon (No Response), ‘Play’ icon (Meeting Started), or the ‘Check Mark’ icon (Complete)

(see Section 2.6 of this design document for details on the new Lobby Monitor pages).

Note: This applies if any of the above icons are clicked through Message Center as well.

Note: (Please see Appendix section for more information on how the Monitor Call should behave based on the status of the Reception Log record).

c. If the 'Hide from Monitor' option is selected while creating the Reception Log Entry, the 'Monitor Call' icon will not appear next to those Reception Log visits or on the Message Center.
   i. The 'Hide from Monitor' option will apply to all visits associated to the Reception Log Entry.

4. Create an error message pop-up window to display when the 'Monitor Call' icon is clicked from Reception Log Detail page as shown on Figure 2.2.7.
   a. Error Message Pop-Up window will display when LRS/CalSAWS system is not able to send the information to the Lobby Monitor after clicking the 'Monitor Call' icon.
      i. Error Message pop-up will display the following message along with a 'Confirm' button at the bottom of the window:
         1. "An error has occurred when sending to the monitor. Please try again."
         2. Clicking the 'Confirm' button will close the error message pop-up window.
   b. Reception Log record status will not be updated to 'Lobby Monitor Call' status.
5. Add the following validation to the Reception Log Detail page:
   a. "Location – Field is required when selecting Monitor Call. Please select a value."
      i. This validation will display when the worker tries to save the Reception Log entry with the 'Monitor Call' icon selected and no 'Location' value selected.
      ii. This validation will apply if the Location is set up through the Lobby Monitor Detail page.

2.2.4 Page Location

- **Reception Log Link located on the LRS Homepage**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update Page Mapping to accommodate the new icon along with the new column titled ‘Location’.

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Message Center

2.3.1 Overview

Update Message Center with the ability for workers to update the Reception Log record status to ‘Lobby Monitor Call’ and update the ‘Location’ information through Message Center.

2.3.2 Message Center Mockup

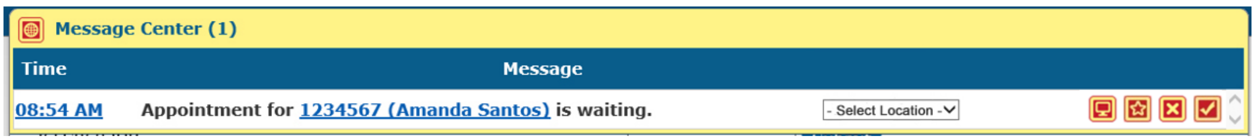

Figure 2.3.1 – Message Center for offices that have ‘Location’ information setup

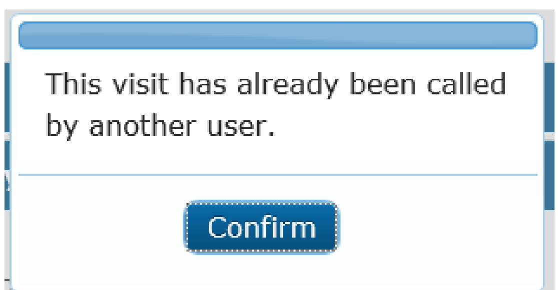

Figure 2.3.2 – Message Center error pop-up window

2.3.3 Description of Changes

1. Update the background color for Message Center from Pink to Yellow as shown on Figure 2.3.1.
2. Update Message Center to display a ‘Location’ drop down field and a ‘Monitor Call’ icon as shown on Figure 2.3.1
   a. Add a ‘Location’ drop down field to Message Center for offices that have ‘Location’ information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).

        i. 'Location' drops down field will display the same information as the 'Location' drop down field in Reception Log.
            1. 'Location' drop down field will display the list of locations inputted on the 'Lobby Monitor Detail' page in alphabetical order.
            2. It will default to the first location on the list or the last location used by the worker.
        ii. For offices that do not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system) the 'Location' drop down field will not display in Message Center.
    b. Add a 'Monitor Call' icon to Message Center that can update the reception log entry to 'Lobby Monitor Call' status.
        i. Once the 'Monitor Call' icon is clicked, the associated reception log record will be updated to 'Lobby Monitor Call' status.
        ii. The 'Monitor Call' icon will no longer display once the worker click the 'X' icon (No Response), 'Play' icon (Meeting Started), or the 'Check Mark' icon (Complete).
        iii. 'Monitor Call' icon will not display if the office does not have 'Location' information set up through the Lobby Monitor Detail page (see Section 2.6 of this Design Document for details on the new Lobby Monitor page that is being added to the LRS/CalSAWS system).
        Note: This apply if any of the above icons are click through Reception Log Detail page.

    Note: (Please see Appendix section for more information on how the Monitor Call should behave based on the status of the Reception Log record).
3. Create an error message pop-up window from Message Center that will display as shown on Figure 2.3.2
    a. The error message pop-up window will display when two different workers are trying to update the reception log entry status to 'Lobby Monitor Call' simultaneously (one from Message Center and the other from Reception Log) by clicking the 'Monitor Call' icon.
    b. Error Message pop-up window will display the following message along with a 'Confirm' button at the bottom of the window.
        i. 'This visit has already been called by another user.'
        ii. Clicking the 'Confirm' button will close the error message pop-up window.
4. Create an error message pop-up window to display when the 'Monitor Call' icon is clicked from Message Center as shown on Figure 2.2.7.

a. Error Message Pop-Up window will display when LRS/CalSAWS system is not able to send the information to the Lobby Monitor after clicking the 'Monitor Call' icon.
    i. Error Message pop-up will display the following message along with a 'Confirm' button at the bottom of the window:
        1. "An error has occurred when sending to the monitor. Please try again."
        2. Clicking the 'Confirm' button will close the error message pop-up window.
b. Reception Log record status will not be updated to 'Lobby Monitor Call' status.

2.3.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

N/A

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 Lobby Management

2.4.1 Overview

Add a new collapsible task bar called 'Lobby Management' under the Global Navigation 'Admin Tools' and Local Navigation 'Office Admin' and create a new Lobby Monitor page and child pages.

2.4.2 Lobby Management Mockup

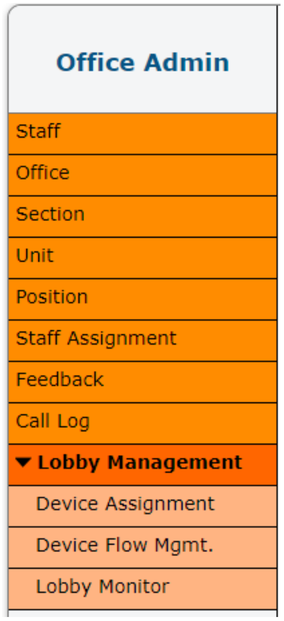

Figure 2.4.1 – New Lobby Management Task Bar

2.4.3 Description of Changes

1. Create a new collapsible task navigation section called 'Lobby Management' under the Global Navigation 'Admin Tools' and Local Navigation 'Office Admin' as shown on Figure 2.4.1.
    a. The 'Lobby Management' navigation will only display for workers that have security rights to access the 'Device Assignment' page, 'Device Flow Mgmt.' page or 'Lobby Monitor' page.
        i. The 'Lobby Management' collapsible navigation task will default to open when user navigate to the Office Admin page.

2.4.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

N/A

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 Lobby Monitor Search page

2.5.1 Overview

Create a new page titled 'Lobby Monitor Search' page that will allow workers to search for an office within their county in order to update the Lobby Monitor for that specific office. The 'Lobby Monitor Search' page will allow workers to search by 'Office ID', 'Office Name' and 'Office Type'.

2.5.2 Lobby Monitor Search Mockup

Lobby Monitor Search

Search

Office ID: | Office Name: | Office Type:

Results per Page: 25 Search

Search Results Summary — **Results 1 - 25 of 105**

1 2 3 4 5 Next

Office ID	Office Name	Office Type	
01	SB TAD 01/WTW/Child Care/PID	District	Edit
02	SB TAD 02/WTW/Child Care/PID	District	Edit
03	Yucca Valley TAD/WTW/Child Care/PID	District	Edit
04	Redlands TAD/WTW/Child Care/WIA/FC/PID	District	Edit
05	VV hospital TAD	Outstation	Edit
06	Barstow TAD/WTW/Child Care/PID	District	Edit
07	SB TAD 07/WTW/Child Care/PID	District	Edit
08	Hesperia TAD/WTW/Child Care/PID/Resource	District	Edit
09	Fontana TAD/WTW/Child Care/PID	District	Edit
10	Needles TAD/WTW/Child Care/CFS/DAAS/PID	District	Edit
11	Hesperia Alternative Education WTW	Outstation	Edit
12	Big Bear WTW	Outstation	Edit
13	NO LONGER USED	District	Edit
14	Waterman Gardens WTW	Outstation	Edit
15	Ontario TAD/WTW/Child Care/PID	District	Edit
16	SB HSS ITSD/ C-IV/ Personnel	District	Edit
17	Arrowhead Regional Medical Center	Outstation	Edit
18	Victorville TAD/WTW/Child Care/PID	District	Edit
19	Colton TAD/WTW/Child Care/FC/PID.	District	Edit
20	SB PID/Appeals/CORU	District	Edit
21	Bear Valley Comm. Hospital TAD	Outstation	Edit
22	SB Emmerton Elementary School TAD	Outstation	Edit
23	Fontana Public Health Clinic TAD	Outstation	Edit
24	Yucaipa TAD/WTW/Child Care/WIA/PID	District	Edit
25	Rancho Cucamonga TAD/WTW/Child Care/PID	District	Edit

1 2 3 4 5 Next

This Type 1 page took 3.08 seconds to load.

Figure 2.5.1 – Lobby Monitor Search page

2.5.3 Description of Changes

1. Create a new page titled 'Lobby Monitor Search' page as shown on Figure 2.5.1.
    a. The page will have a search section containing the following fields:
        i. Office ID

            1. This will be an editable text field.
        ii. Office Name
            1. This will be an editable text field
        iii. Office Type
            1. This will be a drop down field that will list the different office types that is available for the associated county.
                a. Value will be listed in alphabetical order.
            2. Drop down field will default to blank.
    b. Clicking the 'Search' button will update the 'Search Results Summary' section with the result based on the information inputted from the following fields 'Office ID', 'Office Name' or 'Office Type'.
    c. The 'Lobby Monitor Search' page will have 4 different columns under the 'Search Results Summary' section.
        i. First column will be titled 'Office ID'
            1. This column will hold an identification number used by the county and will comprise part of the Worker ID.
            2. The identification number will be a hyperlink that will navigate the worker to the 'Lobby Monitor Detail' page in view mode for that specific office.
        ii. Second column will be titled 'Office Name'
            1. This column will be a descriptive text capturing the name of a physical office location.
        iii. Third column will be titled 'Office Type'
            1. This column will capture the type of office. It may have the following values: Outstation, Regional, Main etc.
        iv. Fourth column will be an 'Edit' button.
            1. Clicking the 'Edit' button will take the worker to the 'Lobby Monitor Detail' page in 'edit' mode for that specific office.
            2. 'Edit' button will be hidden for workers that does not have the proper security right.
    d. The Search Result Summary will default to be in order of 'Office ID' in ascending numerical order.
        i. Worker will need to click on the downward arrow that display in each column in order to sort the result accordingly.
    e. The 'Lobby Monitor Search' page will automatically load with a list of all the offices that is available for the county they are accessing.

Note: Chrome is the preferred browser to use for the Lobby Monitor pages to work properly.

2.5.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**
    - **The new 'Lobby Monitor' task item will appear in the 'Lobby Management' collapsible task navigation section below the 'Device Flow Mgmt.' task item. Clicking the 'Lobby Monitor' task item will take the worker to the 'Lobby Monitor Search' page.**
    - **Users will need proper security rights to see the 'Lobby Monitor' task item.**

2.5.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorView	View Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail	Lobby Monitor View and Lobby Monitor Edit
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search,Lobby Monitor Detail pages and Office Promotion Detail pages	See Security Matrix

2.5.6 Page Mapping

Create new Page Mapping for the Lobby Monitor Search page.

2.5.7 Page Usage/Data Volume Impacts

N/A

2.6 Lobby Monitor Detail page

2.6.1 Overview

Create a new page titled 'Lobby Monitor Detail' page that will contain all the elements that will control the Customer Facing Lobby Monitor for the specified office. This will include Reception Log Locations, Custom Header, News Alerts, Designed Promotions, Office Promotion and Customer Dashboard Link.

2.6.2 Lobby Monitor Detail Mockup

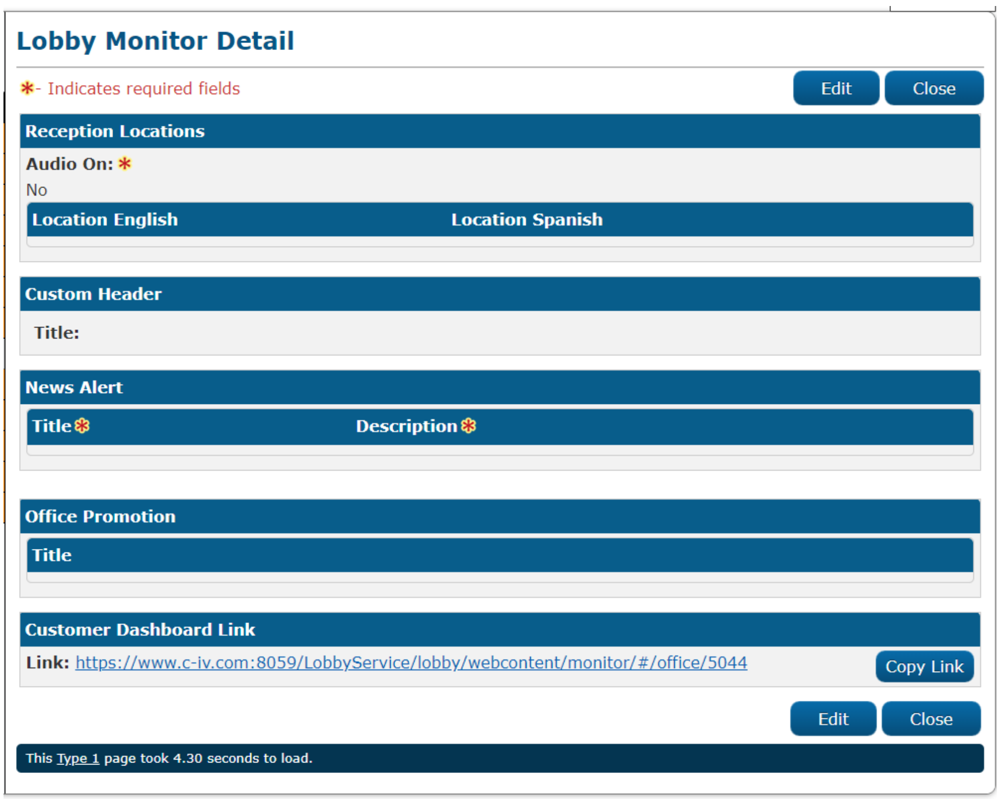

Figure 2.6.1 – Lobby Monitor Detail page View Mode (LA and CalWIN counties)

Lobby Monitor Detail

*- Indicates required fields

Edit | Close

Reception Locations

Audio On: *

No

Location English	Location Spanish

Custom Header

Title:

News Alert

Title *	Description *

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

- Benefit information
- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

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- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:

Yes

Display Spanish Version:

Yes

IVR

Call our Interactive Voice Response (IVR) System

Dial Toll Free 877-410-8829
For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:

Yes

Display Spanish Version:

Yes

Office Promotion

Title

Customer Dashboard Link

Link: https://www.c-iv.com:8059/LobbyService/lobby/webcontent/monitor/#/office/5044 Copy Link

Edit | Close

This Type 1 page took 4.30 seconds to load.

Figure 2.6.2 – Lobby Monitor Detail page View Mode (CIV Counties)

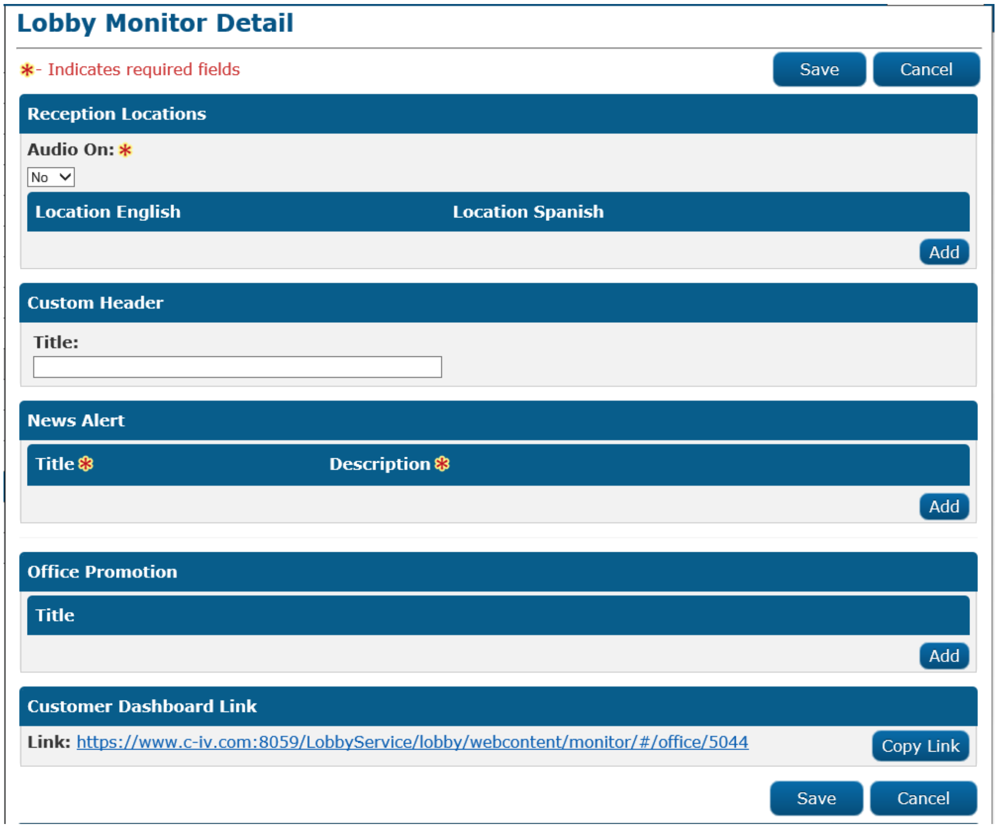
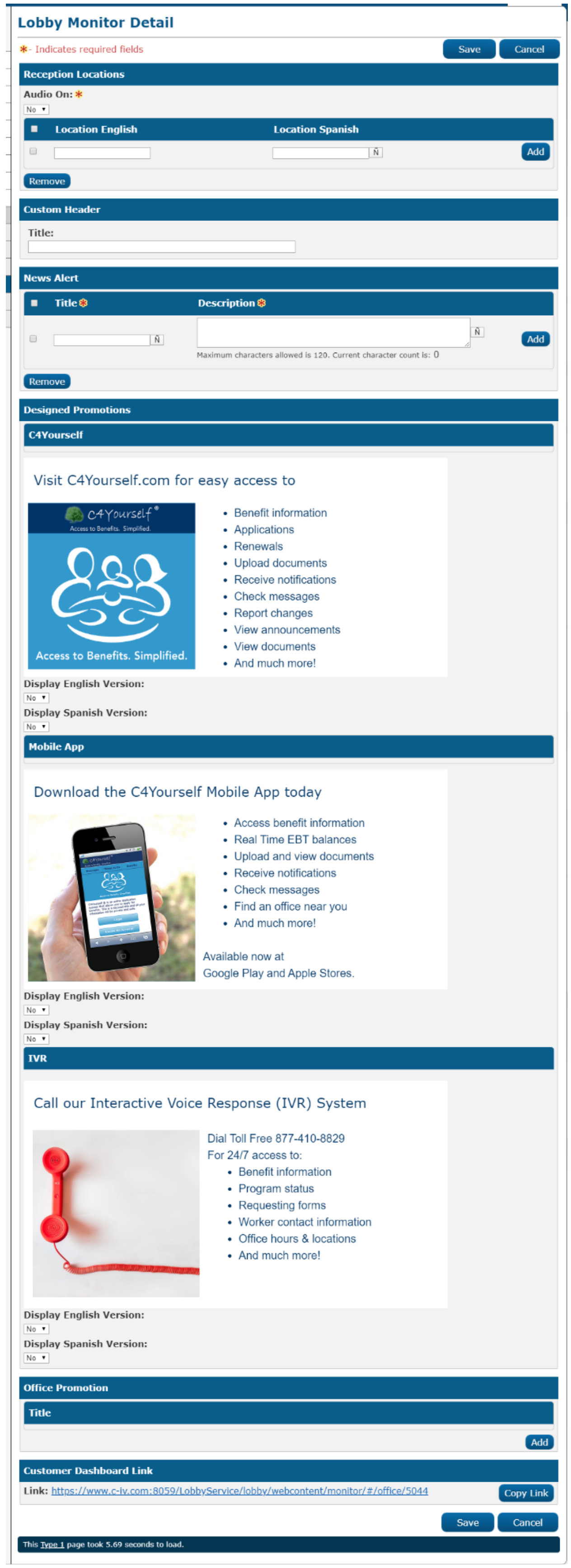


Figure 2.6.3 – Lobby Monitor Detail page Edit Mode (LA and CalWIN counties)



Lobby Monitor Detail
*- Indicates required fields
Save
Cancel
Reception Locations
Audio On: *
No
Location English
Location Spanish
Add
Remove
Custom Header
Title:
News Alert
Title
Description
Add
Maximum characters allowed is 120. Current character count is: 0
Remove
Designed Promotions
C4Yourself
Visit C4Yourself.com for easy access to
C4Yourself
Access to Benefits. Simplified.
Benefit information
Applications
Renewals
Upload documents
Receive notifications
Check messages
Report changes
View announcements
View documents
And much more!
Display English Version:
No
Display Spanish Version:
No
Mobile App
Download the C4Yourself Mobile App today
Access benefit information
Real Time EBT balances
Upload and view documents
Receive notifications
Check messages
Find an office near you
And much more!
Available now at
Google Play and Apple Stores.
Display English Version:
No
Display Spanish Version:
No
IVR
Call our Interactive Voice Response (IVR) System
Dial Toll Free 877-410-8829
For 24/7 access to:
Benefit information
Program status
Requesting forms
Worker contact information
Office hours & locations
And much more!
Display English Version:
No
Display Spanish Version:
No
Office Promotion
Title
Add
Customer Dashboard Link
Link: https://www.c-iv.com:8059/LobbyService/lobby/webcontent/monitor/#/office/5044
Copy Link
Save
Cancel
This Type 1 page took 5.69 seconds to load.

Figure 2.6.4 – Lobby Monitor Detail page Edit Mode (CIV Counties)

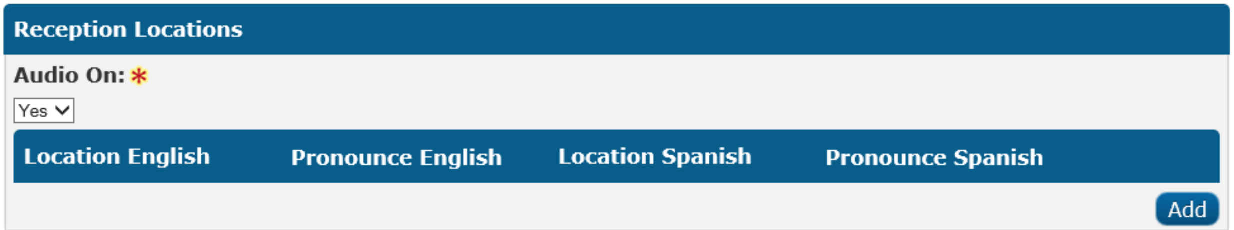


Figure 2.6.5 – Reception Locations Audio On field set to 'Yes' with no 'Location' added

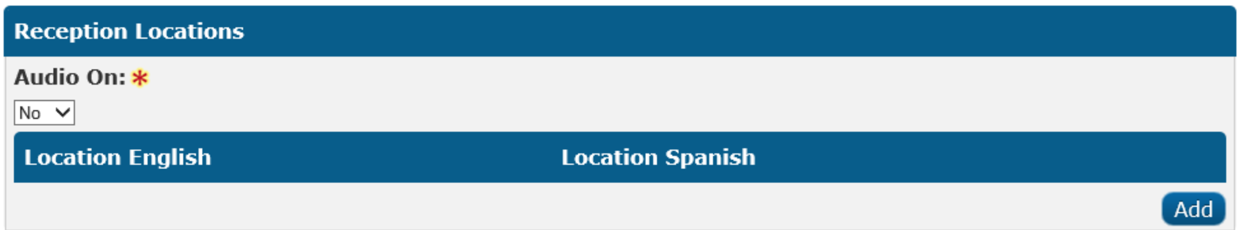


Figure 2.6.6 – Reception Locations Audio On field set to 'No' with no 'Location' added

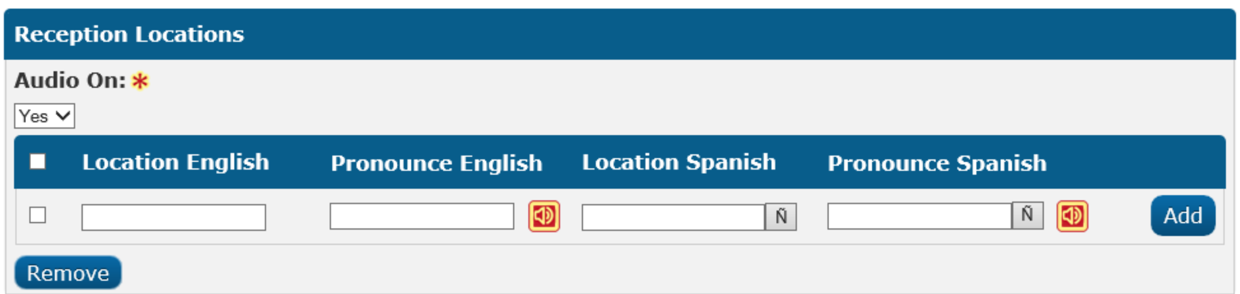


Figure 2.6.7 – Reception Locations Audio On field set to 'Yes' with 'Location' added

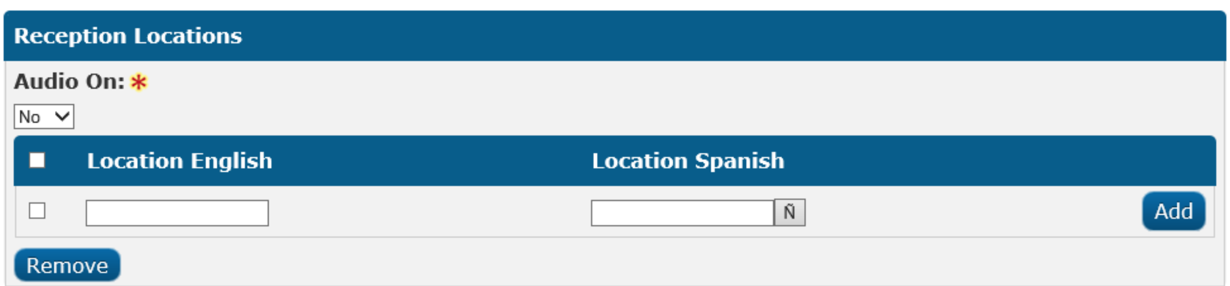


Figure 2.6.8 – Reception Locations Audio On field set to 'No' with 'Location' added

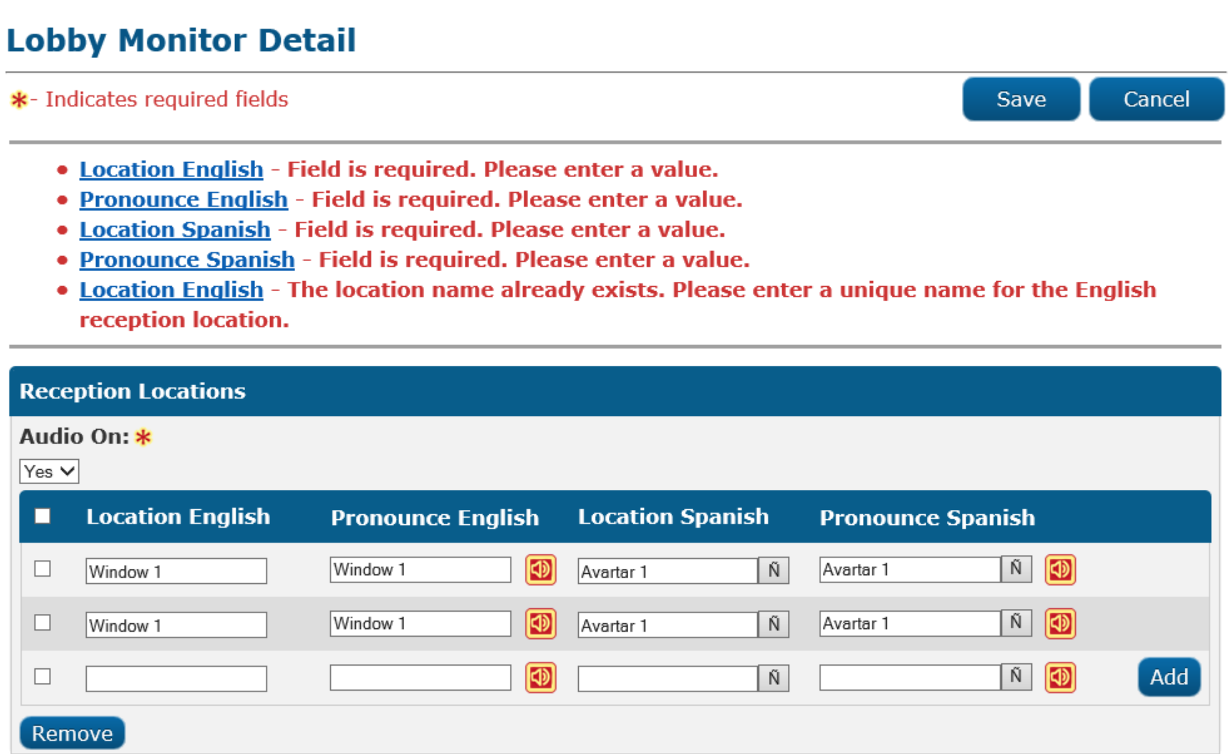


Figure 2.6.9 – Reception Locations Audio On field set to 'Yes' with 'Location' added validations.

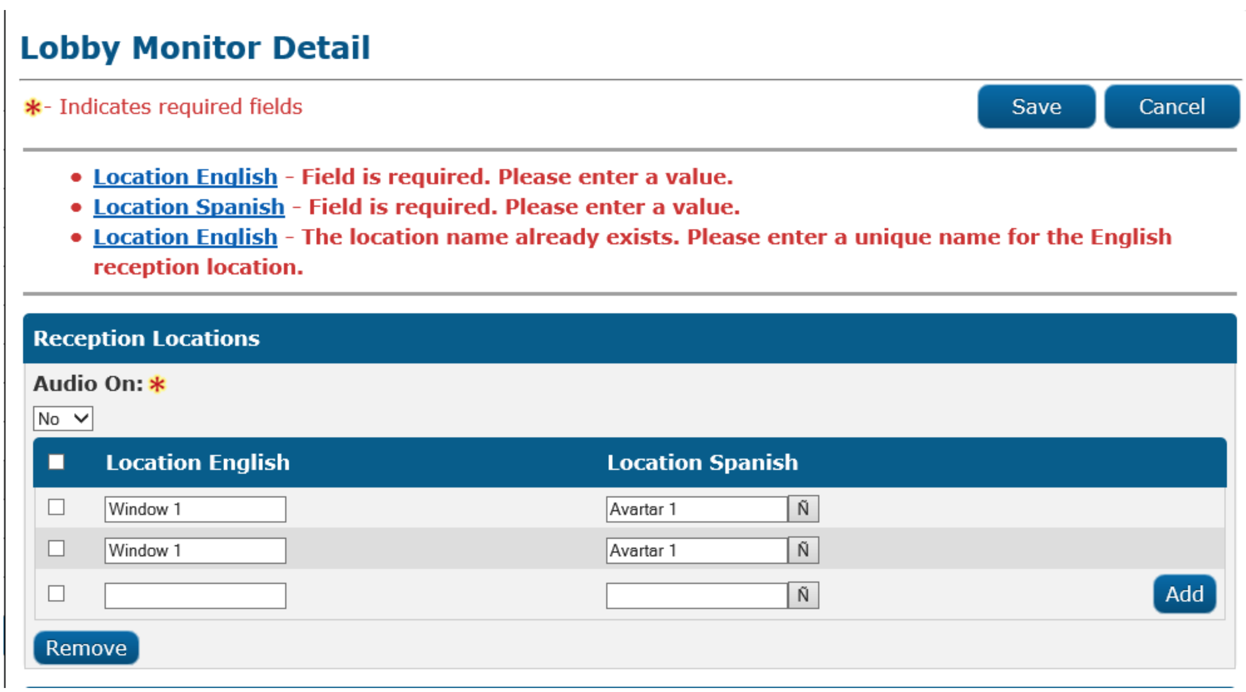


Figure 2.6.10 – Reception Locations Audio On field set to 'No' with 'Location' added validations.

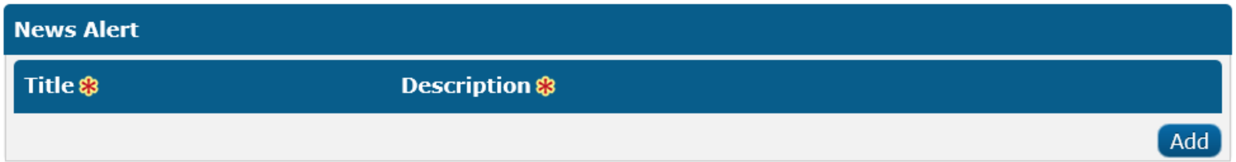


Figure 2.6.11 –No custom News Alert added

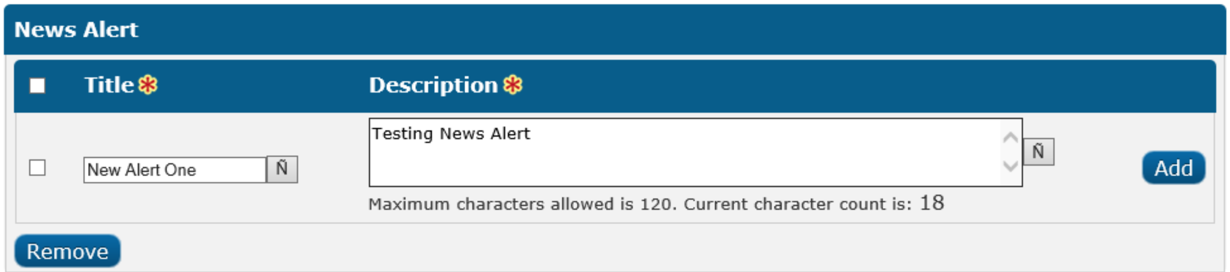


Figure 2.6.12 – Customer News Alert added

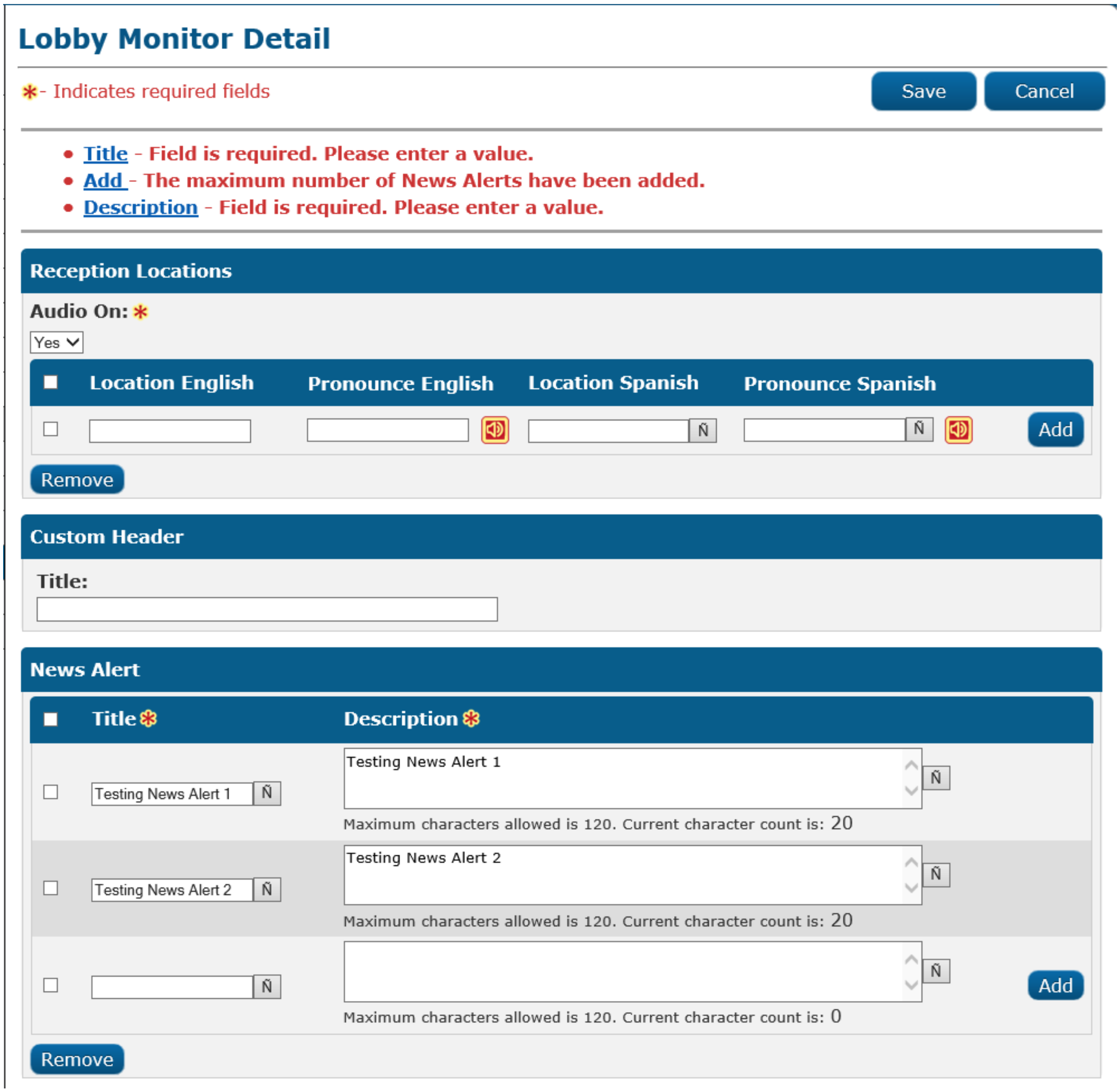


Figure 2.6.13 – Custom News Alert added validations

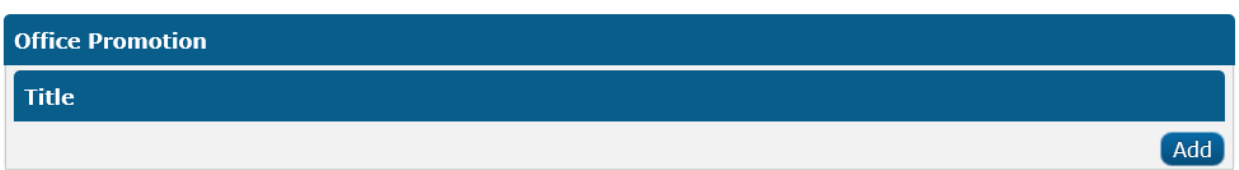


Figure 2.6.14 – No Custom Office Promotion Added

Figure 2.6.15 – With Custom Office Promotion Added


Lobby Monitor Detail
*- Indicates required fields
Save
Cancel
• Add - Office Promotions are pending removal, please click the Save button prior to adding new promotions.
Reception Locations
Audio On: *
Yes
Location English
Pronounce English
Location Spanish
Pronounce Spanish
Add
Custom Header
Title:
News Alert
Title *
Description *
Add
Designed Promotions
C4Yourself
Visit C4Yourself.com for easy access to
C4Yourself
Access to Benefits. Simplified.
• Benefit information
• Applications
• Renewals
• Upload documents
• Receive notifications
• Check messages
• Report changes
• View announcements
• View documents
• And much more!
Access to Benefits. Simplified.
Display English Version:
Yes
Display Spanish Version:
Yes
Mobile App
Download the C4Yourself Mobile App today
• Access benefit information
• Real Time EBT balances
• Upload and view documents
• Receive notifications
• Check messages
• Find an office near you
• And much more!
Available now at
Google Play and Apple Stores.
Display English Version:
Yes
Display Spanish Version:
Yes
IVR
Call our Interactive Voice Response (IVR) System
Dial Toll Free 877-410-8829
For 24/7 access to:
• Benefit information
• Program status
• Requesting forms
• Worker contact information
• Office hours & locations
• And much more!
Display English Version:
Yes
Display Spanish Version:
Yes
Office Promotion
Title
Testing
Edit
Testing 2
Edit
Remove
Add
Customer Dashboard Link
Link: http://:/LobbyService/lobby/webcontent/monitor/#/office/5044
Copy Link
Save
Cancel

Figure 2.6.16 – Office Promotion custom validation

Lobby Monitor Detail

*- Indicates required fields

Save Cancel

• Add - You have reached the maximum number of Office Promotions.

Reception Locations

Audio On: *

Yes

Location English	Pronounce English	Location Spanish	Pronounce Spanish

Add

Custom Header

Title:

News Alert

Title *	Description *

Add

Designed Promotions

C4Yourself

Visit C4Yourself.com for easy access to

C4Yourself
Access to Benefits. Simplified.

Access to Benefits. Simplified.

- Benefit information
- Applications
- Renewals
- Upload documents
- Receive notifications
- Check messages
- Report changes
- View announcements
- View documents
- And much more!

Display English Version:
Yes
Display Spanish Version:
Yes

Mobile App

Download the C4Yourself Mobile App today

- Access benefit information
- Real Time EBT balances
- Upload and view documents
- Receive notifications
- Check messages
- Find an office near you
- And much more!

Available now at
Google Play and Apple Stores.

Display English Version:
Yes
Display Spanish Version:
Yes

IVR

Call our Interactive Voice Response (IVR) System

Dial Toll Free 877-410-8829
For 24/7 access to:

- Benefit information
- Program status
- Requesting forms
- Worker contact information
- Office hours & locations
- And much more!

Display English Version:
Yes
Display Spanish Version:
Yes

Office Promotion

☐	Title	
☐	Testing	Edit
☐	Testing 2	Edit
☐	Testing 3	Edit

Remove Add

Customer Dashboard Link

Link: http://:/LobbyService/lobby/webcontent/monitor/#/office/5044 Copy Link

Save Cancel

This Type 1 page took 10.07 seconds to load.

Figure 2.6.17 – Office Promotion custom validation

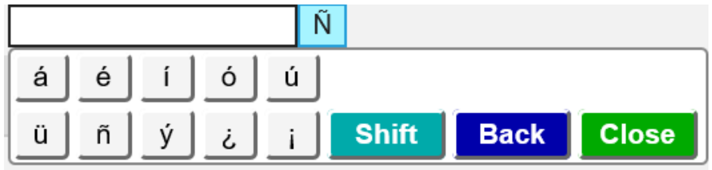


Figure 2.6.18 – Spanish keypad to allow Spanish Characters

2.6.3 Description of Changes

1. Create a new page titled 'Lobby Monitor Detail' page as shown on Figure 2.6.1 through Figure 2.6.4 that is accessible through the 'Lobby Monitor Search' page by either clicking on the 'Office ID' hyperlink ('View' mode) or clicking on the 'Edit' button ('Edit' mode).
    a. The 'Lobby Monitor Detail' page will have the following fields:
        i. Create a section titled 'Reception Locations' as shown on Figure 2.6.5 through Figure 2.6.10.
            1. The 'Reception Locations' section will have the following:
                a. A required drop down field titled 'Audio On:' and will default to 'No' and will have the following options:
                    i. Yes
                    ii. No
                b. A dynamic subsection that will display based on value that is set in the 'Audio On:' drop down field.
                    i. If the 'Audio On:' drop down field is set to 'No' the subsection will have 2 different columns as shown on Figure 2.6.6 and an 'Add' button.
                        1. First Column will be titled 'Location English'.
                        2. Second Column will be titled 'Location Spanish'.
                        3. Clicking the 'Add' button will refresh the page and the subsection will now display 3 columns, an 'Add' button and a 'Remove' button as shown on Figure 2.6.8
                            a. The system will refresh and add an additional row that will allow the worker to add additional Location in

both English and Spanish every time the user click the 'Add' button.

b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
c. First column will be a 'check box'.
d. Second column will be titled 'Location English'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
e. Third column will be titled 'Location Spanish'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. There will be a 'Ñ' icon right

next to the editable text field and clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.

iii. There will be a tool tip that will display 'Open the keypad'.

ii. If the 'Audio On:' drop down field is set to 'Yes' the subsection will have 4 different columns as shown on Figure 2.6.5 and an 'Add' button.
    1. First column will be titled 'Location English'.
    2. Second column will be titled 'Pronounce English'.
    3. Third column will be titled 'Location Spanish'.
    4. Fourth column will be titled 'Pronounce Spanish'.
    5. Clicking the 'Add' button will refresh the page and the subsection will now display 5 columns, an 'Add' button and a 'Remove' button as shown on Figure 2.6.7
        a. The system will refresh and add an additional row that will allow the worker to add additional Location and Pronunciation in both English and Spanish every time the user click the 'Add' button.
        b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button

on the 'Lobby Monitor Detail' page for the information to be updated.

c. First column will be a 'check box'.
d. Second column will be titled 'Location English'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
e. Third column will be titled 'Pronounce English'.
    i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    ii. Text entered in this column will remain even if the 'Audio On' field is changed to 'No'.
    iii. Next to the editable text field there will be an 'Audio' icon.

iv. Clicking on the 'Audio' icon will let the worker preview what the Audio will sound like when calling the locations in English.

   Note: Audio functionality will only work if the LRS/CalSAWS application is open using Chrome.

f. Fourth column will be titled 'Location Spanish'.
   i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
   ii. There will be a 'Ñ' icon right next to the editable text field.
   iii. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
   iv. There will be a tool tip that will

display ‘Open the keypad’.

g. Fifth column will be titled ‘Pronounce Spanish’.
   i. This column will have an editable text field and have a 20 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
   ii. Text entered in this column will remain even if the ‘Audio On’ field is changed to ‘No’.
   iii. There will be a ‘Ñ’ icon right next to the editable text field.
   iv. Clicking on the ‘Ñ’ icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
   v. There will be a tool tip that will display ‘Open the keypad’.
   vi. Next to the ‘Ñ’ icon there will be an ‘Audio’ icon.
   vii. Clicking on the ‘Audio’ icon will let the worker

preview what the Audio will sound like when calling the locations in Spanish.
Note: Audio functionality will only work if the LRS/CalSAWS application is open using Chrome.

c. Add the following custom validation for the 'Reception Locations' section as shown on Figure 2.6.9 and Figure 2.6.10.
    i. "Location English – The Location name already exists. Please enter a unique name for the English reception location."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail 'page and the Location English field have more than 1 unique name.
    ii. "Location English – Field is required. Please enter a value."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Location English' editable text field.
    iii. "Location Spanish – Field is required. Please enter a value."
        1. This validation will be trigger when the worker clicks the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Location Spanish' editable text field.
    iv. "Pronounce English – Field is required. Please enter a value."
        1. This validation will be trigger if the 'Audio On' field is set to

'Yes' and the worker click the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Pronounce English' editable text field.

v. "<u>Pronounce Spanish</u> – Field is required. Please enter a value."
   1. This validation will be trigger if the 'Audio On' field is set to 'Yes' and the worker click the 'Save' button on the 'Lobby Monitor Detail' page without inputting any information in the 'Pronounce Spanish' editable text field.

2. Information entered under the 'Reception Locations' will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

ii. Create a section titled 'Custom Header' as shown on Figure 2.6.1through Figure 2.6.4.
   1. The 'Custom Header' section will have an editable text field titled 'Title:'.
      a. Editable field will have a maximum ~~80~~ 50characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
      b. Only one Custom Header can be created.
      c. Custom Header information will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.
      d. Custom header is available in English only.

iii. Create a section titled 'News Alert' as shown on Figure 2.6.11 through Figure 2.6.13.
   1. The 'News Alert' section will have two columns and an 'Add' button as shown on Figure 2.6.11.
      a. First column will be titled 'Title' and will be required.
      b. Second column will be titled 'Description' and will be required.
      c. Clicking the 'Add' button will refresh the page and the 'News Alert' section will now have threes columns, an 'Add' button and a 'Remove' button as shown on figure 2.6.12.
         i. The system will refresh and add an additional row that will allow the

worker to add additional News Alert every time the user click the 'Add' button.

ii. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
iii. First column will be a 'check box'.
iv. Second column will be titled 'Title' and will be a required field.
    1. This column will have an editable text field and have a 30 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    2. There will be a 'Ñ' icon right next to the editable text field.
        a. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
        b. There will be a tool tip that will display 'Open the keypad'.
v. Third column will be titled 'Description' and will be a required field.
    1. This column will have an editable text field and have a 120 characters limit. Once the maximum characters limit has been reached, no further characters can be inputted.
    2. There will be a 'Ñ' icon right next to the editable text field.
        a. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.19.

b. There will be a tool tip that will display 'Open the keypad'.

3. Underneath the editable text field it will display a character tracking. This will track the number of characters entered in this field.
    a. Character tracking will have the following language: "Maximum characters allowed is 120. Current character count is: 0"
        i. It will start with 0 but will increase as the amount of characters entered in the field increases.

2. The 'News Alert' section can have a maximum of three custom News Alert.
3. Add the following validations as shown on Figure 2.6.13.
    a. "Add – The maximum number of News Alert have been added."
        i. This validation will be trigger when a worker clicks the 'Add' button under the 'News Alert' section when there's already three custom News Alert.
4. Custom News Alert information will not be saved until the worker click the 'Save' button on the 'Lobby Monitor Detail' page.

iv. Create a section titled 'Designed Promotions' as shown on Figure 2.6.1 through Figure 2.6.4 that will display for C-IV counties offices only.

1. Create three subsections for the 'Design Promotions' section.
    a. First subsection will be titled 'C4Yourself' and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will be available in Spanish as well.
        i. Custom promotion will be titled 'Visit C4Yourself.com for easy access to'.

1. Title in Spanish: ‘Visite C4Yourself.com para acceder fácilmente a’

ii. Custom promotion will have the following descriptions:
    1. It will display the C4Yourself image.
    2. It will list the following information in bullet points and in the order as listed below:
        a. Benefit information
            i. Spanish: ‘Información de beneficios’
        b. Applications
            i. Spanish: ‘Solicitudes’
        c. Renewals
            i. Spanish: ‘Renovación’
        d. Upload documents
            i. Spanish: ‘Subir documentos’
        e. Receive notifications
            i. Spanish: ‘Recibir notificaciones’
        f. Check messages
            i. Spanish: ‘Revisar mensajes’
        g. Report changes
            i. Spanish: ‘Reportar cambios’
        h. View announcements
            i. Spanish: ‘Ver anuncios’
        i. View documents
            i. Spanish: ‘Ver documentos’
        j. And much more!
            i. Spanish: ‘y mucho más!

iii. The two drop down fields will have the following titles:
    1. First drop down field will be titled ‘Display English Version’.

a. This field will have two different drop down values and it will be listed in the following order:
    i. 'No'
    ii. 'Yes'
b. It will default to 'No'.

2. Second drop down field will be titled 'Display Spanish Version'.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. 'No'
        ii. 'Yes'
    b. It will default to 'No'.

b. Second subsection will be titled 'Mobile App' and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will be available in Spanish as well.
    i. Custom promotion will be titled 'Download the C4Yourself Mobile App today'.
        1. Title in Spanish: 'Descargue hoy la aplicación móvil de C4Yourself'
    ii. Custom promotion will have the following descriptions:
        1. It will display an image of a cell phone.
        2. It will list the following information in bullet points and in the order as listed below:
            a. Access benefit information
                i. Spanish: 'Acceder la información sobre sus beneficios'
            b. Real Time EBT balances

i. Spanish: 'Saldos de EBT'

c. Upload and view documents
   i. Spanish: 'Cargar y ver documentos'

d. Receive notifications
   i. Spanish: 'Recibir notificaciones'

e. Check messages
   i. Spanish: 'Revisar mensajes'

f. Find an office near you
   i. Spanish: 'Encontrar una oficina cerca de usted'

g. And much more!
   i. Spanish: 'y mucho más!

3. It will display the following message:
   a. First line: 'Available now at'
      i. Spanish: 'Disponible ahora en'
   b. Second line: 'Google Play and Apple Stores.'
      i. Spanish: 'Google Play y tiendas de Apple.'

iii. The two drop down fields will have the following titles:
   1. First drop down field will be titled 'Display English Version'.
      a. This field will have two different drop down values and it will be listed in the following order:
         i. 'No'
         ii. 'Yes'
      b. It will default to 'No'.

2. Second drop down field will be title ‘Display Spanish Version’.
    a. This field will have two different drop down values and it will be listed in the following order:
        i. ‘No’
        ii. ‘Yes’
    b. It will default to ‘No’.

c. Third subsection will be titled ‘IVR and will display a custom promotion as shown on Figure 2.6.2 and Figure 2.6.4 and two drop down fields. Custom promotion will also be available in Spanish.
    i. Custom promotion will be titled ‘Call our Interactive Voice Response (IVR) System’.
        1. Title in Spanish: ‘Llame a nuestro Sistema de Respuesta de Voz Interactive (IVR)
    ii. Custom promotion will have the following descriptions:
        1. It will display an image of a phone.
        2. It will display the following message: ‘Dial Toll Free [IVR number] For 24/7 access to:’
            a. Spanish: ‘Marque el número gratuito [IVR number] para el acceso 24/7 a:’
            b. The [IVR number] will be specific to the IVR phone number for each county. This will apply for both the English and Spanish version of the promotion.
        3. It will list the following information in bullet points and in the order as listed below:
            a. Benefit information

i. Spanish: 'Información de beneficios'

b. Program status

   i. Spanish: 'Estado del programa'

c. Requesting form

   i. Spanish: 'Solicitud de formularios'

d. Worker contact information

   i. Spanish: 'Información de contacto del trabajador'

e. Office hours & Locations

   i. Spanish: 'Horario de oficina y ubicaciones'

f. And much more!

   i. Spanish: 'y mucho más!'

iii. The two drop down fields will have the following titles:

1. First drop down field will be titled 'Display English Version'.
   a. This field will have two different drop down values and it will be listed in the following order:
      i. 'No'
      ii. 'Yes'
   b. It will default to 'No'.
2. Second drop down field will be title 'Display Spanish Version'.
   a. This field will have two different drop down values and it will be listed in the following order:
      i. 'No'
      ii. 'Yes'
   b. It will default to 'No'.

2. The 'Designed Promotions' section will be hidden for offices in Los Angeles County and offices in CalWIN Counties. The 'Lobby Monitor Detail' page will look like Figure 2.6.1 and Figure 2.6.3.

v. Create a section titled 'Office Promotion' as shown on Figure 2.6.14 through Figure 2.6.17.
   1. Create a subsection titled 'Title' along with an 'Add' button as show on Figure 2.6.14.
      a. Clicking the 'Add' button will navigate the worker to the 'Office Promotion Detail' page in 'Create' mode (see section 2.7 for further information).
   2. The 'Office Promotion' section can have a maximum of three custom Office Promotion.
      a. When an office promotion has been saved through the 'Office Promotion Detail' page, the 'Office Promotion' subsection will have 2 columns, an and a 'Remove' button as shown on Figure 2.6.18.
         i. Column 1 will have a 'check box'.
         ii. Column 2 will be titled 'Title'.
            1. It will display the text that's been inputted in the 'Title' field on the 'Office Promotion Detail' (Figure 2.7.1) page as a hyperlink.
               a. Clicking the hyperlink will navigate the worker to the 'Office Promotion Detail' page in 'View' mode.
            2. It will display an 'Edit' button.
               a. Clicking on the 'Edit' button will navigate the worker to the 'Office Promotion Detail' page in 'Edit' mode.
      b. Clicking the 'Remove' button will remove the row right away but the worker will need to click the 'Save' button on the 'Lobby Monitor Detail' page for the information to be updated.
      c. Create a custom validation as shown on Figure 2.6.16 and Figure 2.6.17.
         i. <u>Add</u> – You have reached the maximum number of Office Promotions.

1. This validation will display when a user clicks the 'Add' button after three office promotions has been added.

ii. Add – Office Promotions are pending removal, please click the Save button prior to adding new promotions.

1. This validation will display when there's 3 custom office promotions and they checked off one or more of the custom office promotion and click the 'Remove' button and then click the 'Add' button.

vi. Create a section titled 'Customer Dashboard Link' as shown on Figure 2.6.1 through Figure 2.6.4.

1. 'Customer Dashboard Link' section will display the following

a. Link: 'Office hyperlink'

i. 'Office hyperlink' will be a unique hyperlink for each office.

ii. Clicking the hyperlink will navigate the user to the customer facing Lobby Monitor System (see section 2.8 for more information).

b. 'Copy Link' button.

i. Clicking on the button will copy the hyperlink.

Note: Chrome is the preferred browser to use for the Lobby Monitor pages to work properly.

2.6.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**

2.6.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit,
LobbyMonitorRemove	View and Edit Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Information Remove
LobbyMonitorView	View the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail.	Lobby Monitor View, Lobby Monitor Edit, Information Remove

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search, Lobby Monitor Detail pages and Office Promotion pages	See Security Matrix
Information Remove	Remove information from lists across data collection pages	Eligiibility Supervisor, Regional Call Center Supervisor, System Administrator

2.6.6 Page Mapping

Create new Page Mapping for the Lobby Monitor Detail page

2.6.7 Page Usage/Data Volume Impacts

N/A

2.7 Office Promotion Detail

2.7.1 Overview

Create a new page titled 'Office Promotion Detail' that will contain all the elements that will allow users to create their own office promotion that will display on the Customer Facing Lobby Monitor for the specified office.

2.7.2 Office Promotion Detail Mockup

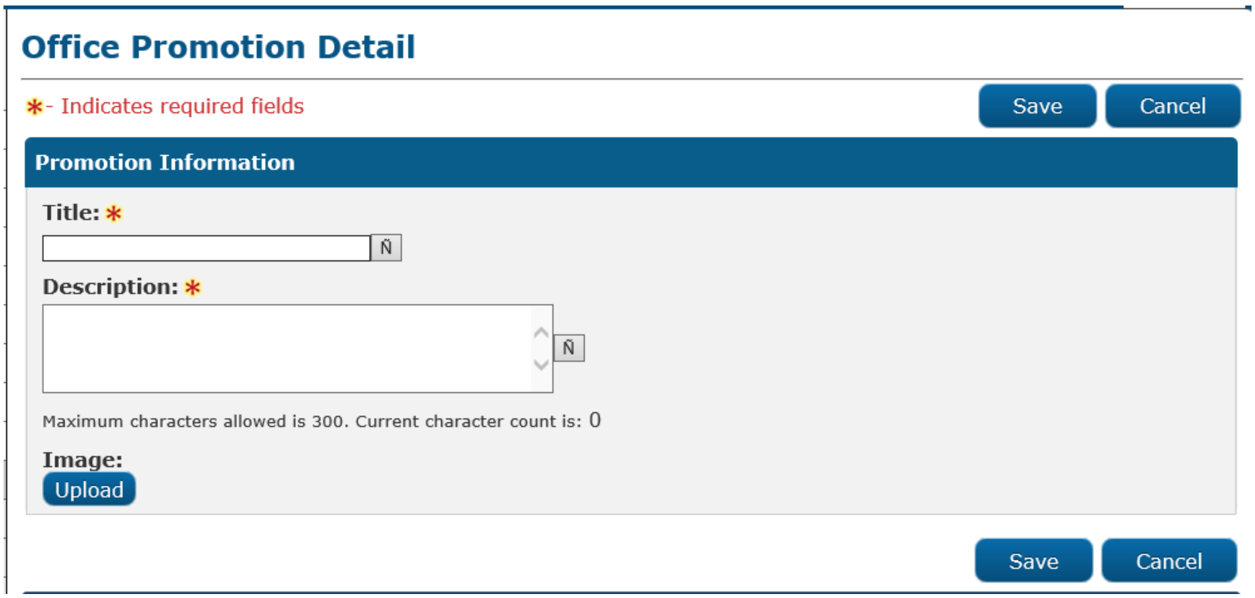


Figure 2.7.1 – Office Promotion 'Create' mode

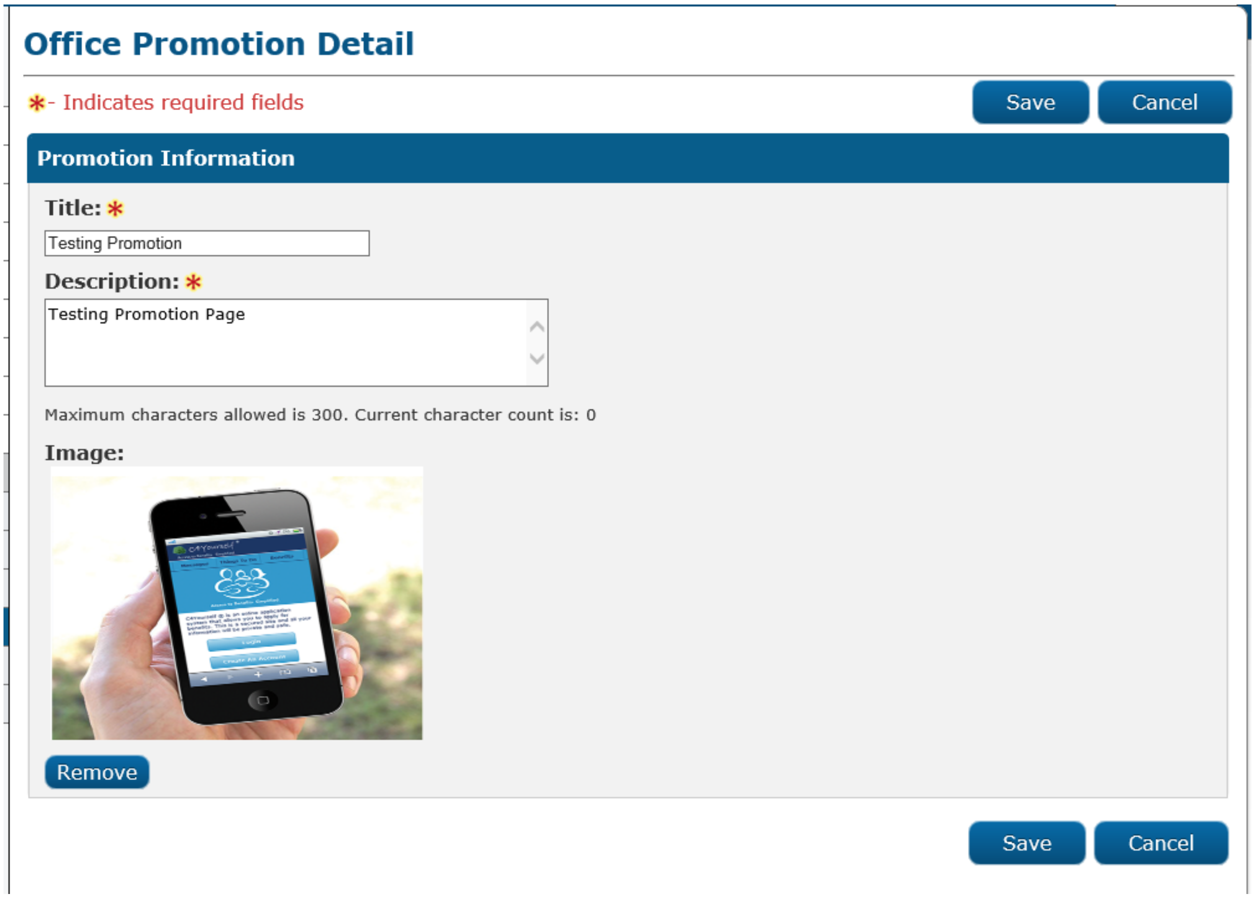


Figure 2.7.2 – Office Promotion 'Edit' mode.

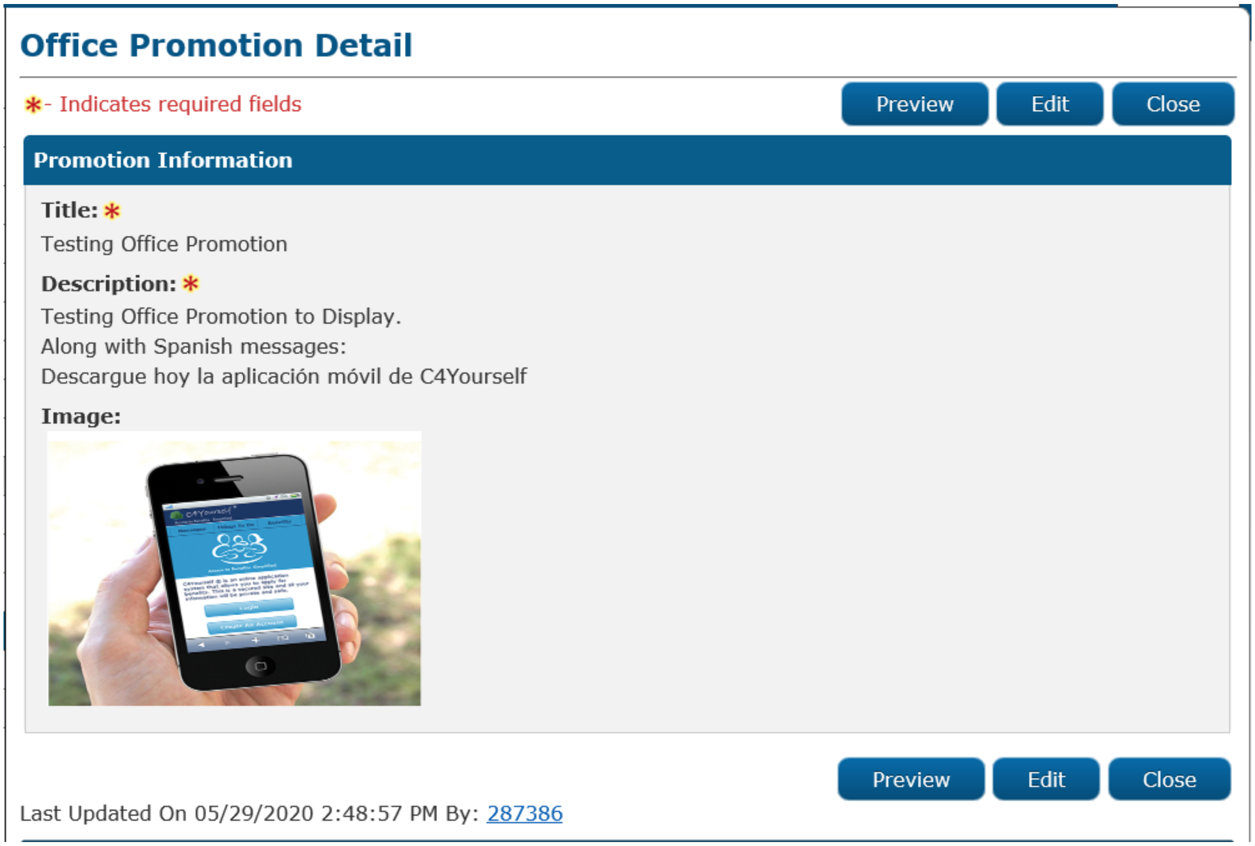


Figure 2.7.3 – Office Promotion 'View' mode.

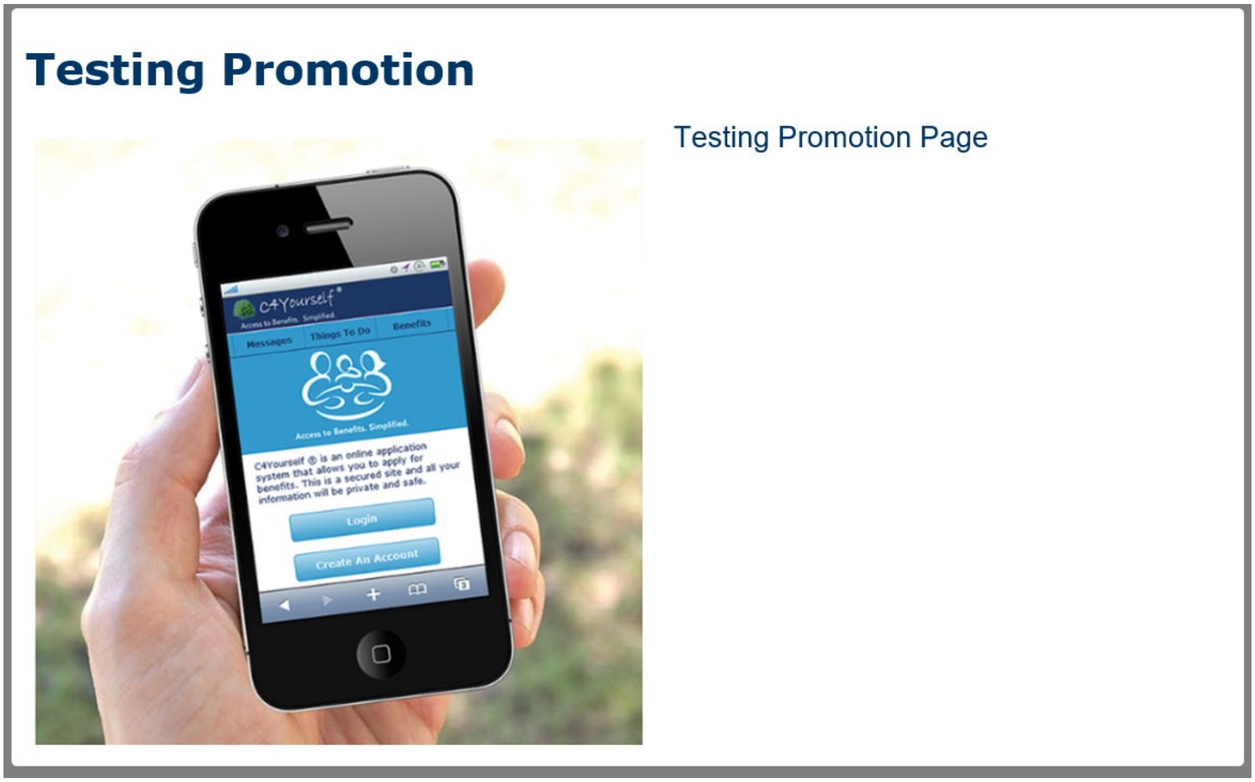


Figure 2.7.4 – Office Promotion 'Preview' window.

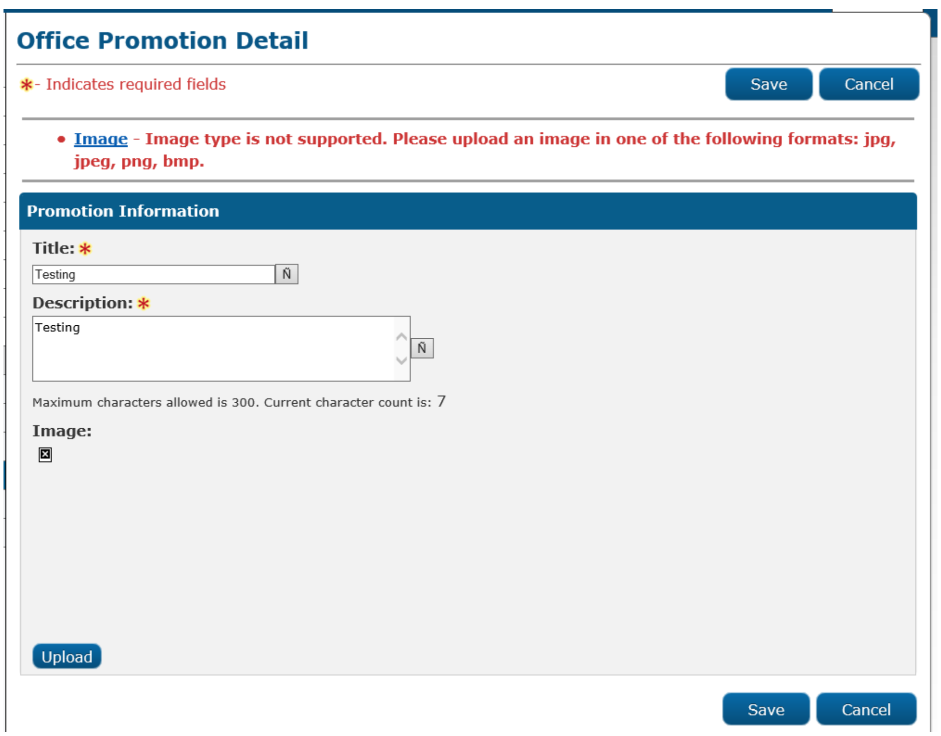


Figure 2.7.5 – Office Promotion validation 1

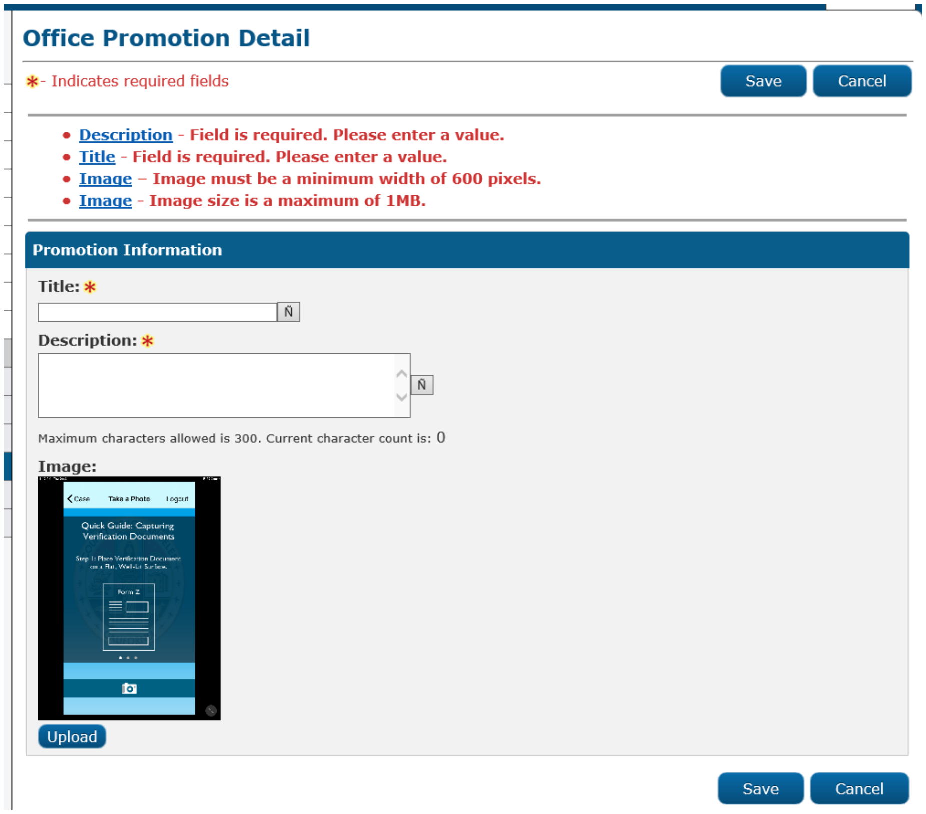


Figure 2.7.6 – Office Promotion validation 2

2.7.3 Description of Changes

1. Create a new page titled 'Office Promotion Detail as shown on Figure 2.7.1 to Figure 2.7.3.
    a. The 'Office Promotion Detail' will have a section titled 'Promotion Information'.
        i. Within the 'Promotion Information' section it will have the following fields.
            1. An editable text field titled 'Title:'
                a. This editable text field will be required and have a maximum characters of 30. Once the maximum characters limit has been reached, no further characters can be inputted.
                    i. There will be a 'Ñ' icon right next to the editable text field.
                        1. Clicking on the 'Ñ' icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.

a. There will be a tool tip that will display ‘Open the keypad’.

2. An editable text field titled ‘Description:’
    a. This editable text field will be required and have a maximum characters of 300. Once the maximum characters limit has been reached, no further characters can be inputted.
        i. There will be a ‘Ñ’ icon right next to the editable text field.
            1. Clicking on the ‘Ñ’ icon will open a Spanish keypad that will allow for Spanish characters as shown on Figure 2.6.18.
                a. There will be a tool tip that will display ‘Open the keypad’.
        ii. Underneath the editable text field it will display a character tracking. This will track the number of characters entered in this field.
                a. Character tracking will have the following language: “Maximum characters allowed is 300. Current character count is: 0
                    i. It will start with 0 but will increase as the amount of characters entered in the field increases.
3. A field to upload an image. This field will be titled ‘Image:’
    a. It will have an ‘Upload’ button.
        i. Clicking the ‘Upload’ button will allow the user to upload an image.
            1. Image width must be a minimum of 600 pixels.
            2. Image size will be a maximum of 1MB.
            3. Image will only be supported for the following file type only:
                a. jpg
                b. jpeg

c. png
d. bmp

4. The ‘Office Promotion Detail’ page in ‘Edit’ mode, will have a ‘Remove’ button when there is an image that was uploaded as shown on Figure 2.7.2.
    a. Clicking the ‘Remove’ button will remove the uploaded image and the ‘Remove’ button will be replace by the ‘Upload’ button.
        i. Clicking the ‘Upload’ button will allow the user to upload an image.
            1. User will need to click ‘Save’ button on the ‘Office Promotion Detail’ page for the new uploaded image to be saved.
            2. User will need to click’ the ‘Save’ button on the ‘Office Promotion Detail’ page and access the page in ‘Edit’ mode again in order to remove the image.

b. The ‘Office Promotion Detail’ page will have a ‘Save’ button, a ‘Cancel’ button, a ‘Preview’ button, an ‘Edit’ button and a ‘Close’ button.
    i. The ‘Save’ button will save the information that the user added under the ‘Promotion Information’ section and will take the user back to the ‘Lobby Monitor Detail’ page.
        1. ‘Save’ button will display when the ‘Office Promotion Detail’ page is in ‘Create’ or ‘Edit’ mode.
    ii. The ‘Cancel’ button’ will discard any changes that was made under the ‘Promotion Information’ section and will take the user back to the ‘Lobby Monitor Detail’ page.
        1. ‘Cancel’ button will display when the ‘Office Promotion Detail’ page is in ‘Create or ‘Edit’ mode.
    iii. The ‘Preview’ button will display when the ‘Office Promotion Detail’ page is in ‘View’ mode.
        1. Clicking the ‘Preview’ button will open a new window and will display what the office promotion will look like based on the information inputted on the ‘Promotion Information’ section as shown on Figure 2.7.4.
    iv. The ‘Edit’ button will display when the ‘Office Promotion Detail’ page is in ‘View’ mode.

            1. Clicking on the 'Edit' button will take the user to the 'Office Promotion Detail' page in 'Edit' mode.
        v. The 'Close' button will display when the 'Office Promotion Detail' page is in 'View' mode.
            1. Clicking the 'Close' button will take the user back to the 'Lobby Monitor Detail' page.
    c. Create the following custom validations as shown on Figure 2.7.5 and Figure 2.7.6.
        i. '<u>Image</u> – Image type is not supported. Please upload an image in one of the following formats: jpg, jpeg, png, bmp.'
            1. This validation will display when the user clicks the 'Save' button on the 'Office Promotion Detail' page and the uploaded image is not one of the following supported formats: jpg, jpeg, png, bmp.
        ii. '<u>Image</u> – Image must be a minimum width of 600 pixels.'
            1. This validation will display when the user clicks the 'Save' button on the 'Office Promotion Detail' page and the uploaded image does not have a minimum width of 600 pixels.
        iii. '<u>Image</u> – Image size is a maximum of 1MB.'
            1. This validation will display when the user clicks the 'Save' button on the 'Office Promotion Detail' page and the uploaded image have a size greater than 1 MB.

Note: Chrome is the preferred browser to use for the Office Promotion Detail page to work properly.

2.7.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**

2.7.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
LobbyMonitorEdit	View and Edit Lobby Monitor Search; Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit,

LobbyMonitorRemove	View and Edit Lobby Monitor Detail; Office Promotion Detail;	Lobby Monitor Edit, Information Remove
LobbyMonitorView	View the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail.	Lobby Monitor View, Lobby Monitor Edit, Information Remove

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Lobby Monitor Edit	View and Edit the Lobby Monitor Search, Lobby Monitor Detail and Office Promotion Detail pages.	See Security Matrix
Lobby Monitor View	View the Lobby Monitor Search, Lobby Monitor Detail pages and Office Promotion pages	See Security Matrix
Information Remove	Remove information from lists across data collection pages	Eligiibility Supervisor, Regional Call Center Supervisor, System Administrator

2.7.6 Page Mapping

Create a new page mapping for the Office Promotion Detail page.

2.7.7 Page Usage/Data Volume Impacts

N/A

2.8 Lobby Monitoring System

2.8.1 Overview

Create a Lobby Monitoring system that will show an animated display in the Lobby Monitoring Screen that will be use by the county offices to inform the customer where to go and the ability to display promotions and other pertinent information.

2.8.2 Lobby Monitoring System Mockup

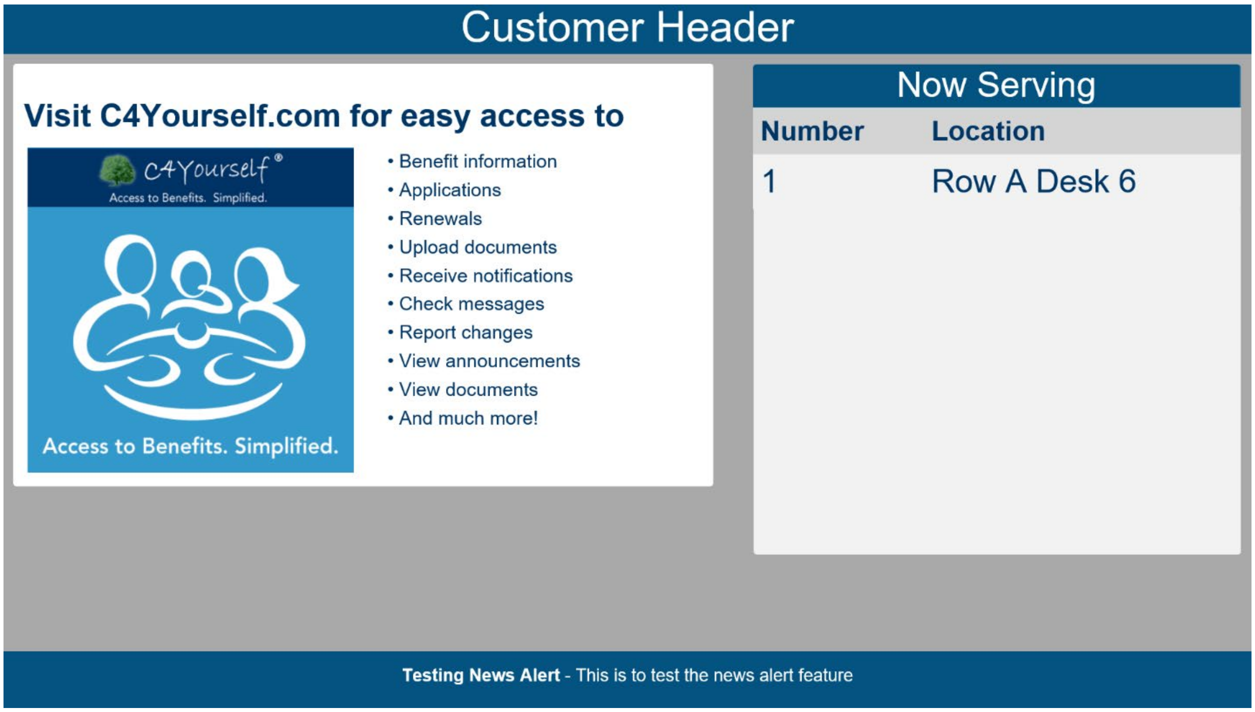


Figure 2.8.1 – Lobby Monitoring System

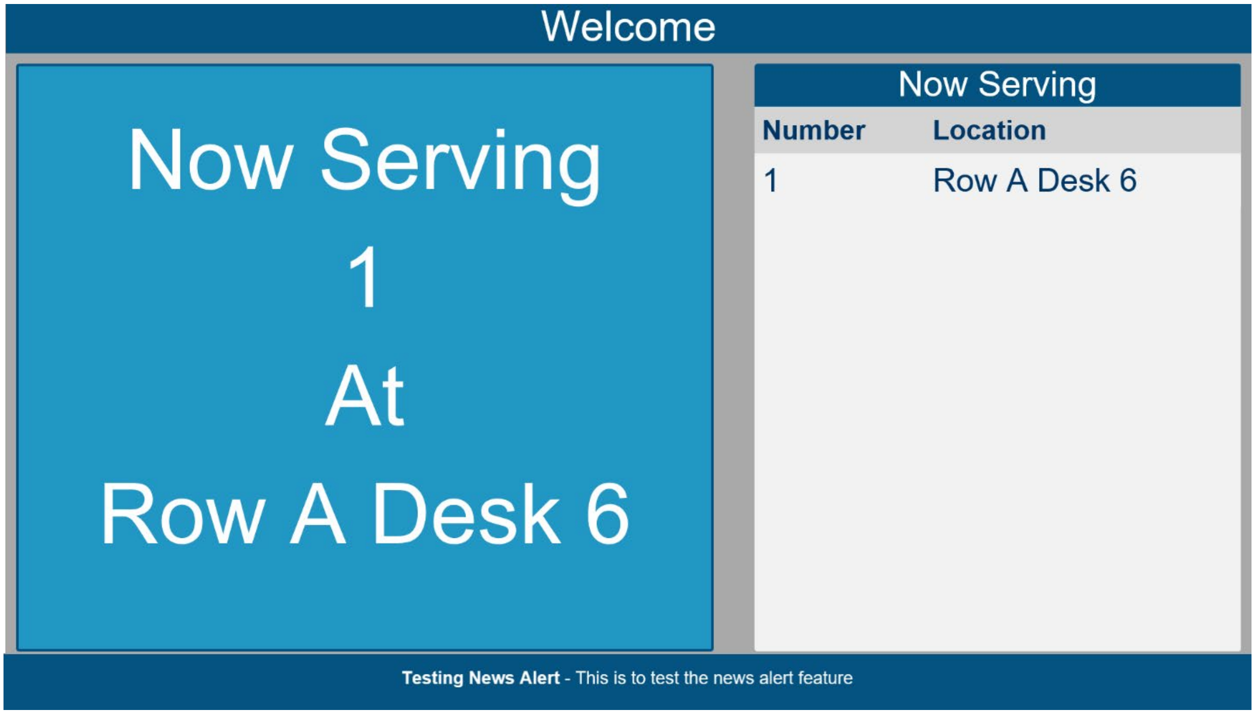


Figure 2.8.2 – Lobby Monitoring System with Number call

2.8.3 Description of Changes

1. Create an animated display to be display as part of the Lobby Monitoring Screen that will show the customers' number and the associated location, along with displaying the office promotion(s) and pertinent information as shown on Figure 2.8.1 and Figure 2.8.2.
    a. Display a 'Custom Header' as part of the Lobby Monitoring Screen.
        i. 'Custom Header' to be located on the top of the Lobby Monitor Screen.
        ii. 'Custom Header' will default to 'Welcome' (as shown on Figure 2.8.2) unless a different value is entered on the Lobby Monitor Detail page under the 'Custom Header' field (as shown on Figure 2.8.1).
    b. Display a list showing the customer's number that was called along with the location they should proceed.
        i. List will be located on the right hand side of the Lobby Monitor Screen and will display the following:
            1. It will have a header titled 'Now Serving'.
            2. Two columns underneath the 'Now Serving' titled.
                a. First column will be titled 'Number'.
                    i. This column will display the 'Number Assigned' information from the Reception Log specific to the

Reception Log record that was created.

1. This column will display both the 'Prefix' and the 'Number'.

b. Second column will be titled 'Location'.

i. This column will display the 'Location' information that is associated to the 'Number Assigned' for the specific Reception Log record.

1. This column will display the Location information that's chosen from the Reception Log. If the 'Location' information is changed in Reception Log, the 'Location' information being display will also change accordingly.

ii. Information being listed will display in the Lobby Monitor Screen when the status in the Reception Log record is updated to 'Lobby Monitor Call'.

iii. Information being listed will no longer display in the Lobby Monitor Screen when the Reception Log record is updated to one of the following statuses:

1. Meeting Started
2. Complete
3. No Response.

Note: For Reception Log entry that have the 'Hide from Monitor' field checked off, will not be display on the Monitor.

c. Display 'Designed Promotions' and 'Office Promotion' on the left hand side of the Lobby Monitor Screen.

i. Both the 'Designed Promotions' and 'Office Promotion' will display in the same location and it will cycle through.

a. 'Office Promotion' being display in the Lobby Monitor will be based on the information that was created in the 'Office Promotion' section on the Lobby Monitor Detail page.

i. If there are multiple custom office promotions created, it'll display in the same order as how its listed on the Lobby Monitor Detail page. However, there will be instances where the order being display may change and no longer match with how its being listed on the Lobby Monitor Detail page. This can happen when a Lobby Monitor Call or multiple Lobby Monitor Call occurs when the office promotion are in the middle of cycling through. ~~cycle through based on the order that is listed on the 'Lobby Monitor Detail' page.~~

2. 'Designed Promotions' will cycle through after all the 'Office Promotion'.
    a. 'Designed Promotions' being display in the Lobby Monitor will be based on the value being set in the 'Designed Promotions' section on the Lobby Monitor Detail page.
        i. The 'C4Yourself' designed promotion will display if the 'Display English Version' is set to 'Yes'.
            1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'C4Yourself' design promotion will display after the English version.
        ii. The 'Mobile App' designed promotion will display if the 'Display English Version' is set to 'Yes'.
            1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'Mobile App' design promotion will display after the English version.
        iii. The 'IVR' designed promotion will display if the 'Display English Version' is set to 'Yes'.
            1. If the 'Display Spanish Version' is set to 'Yes' the Spanish version of the 'IVR' design promotion will display after the English version.
    b. The order in which the 'Designed Promotions' being cycle through will be as the following when all 3 sections for both the 'Display English Version' and 'Display Spanish Version' is set to 'Yes' on the 'Lobby Monitor Detail' page:
        i. C4Yourself
            1. English
            2. Spanish
        ii. Mobile App
            1. English

            2. Spanish
      iii. IVR
            1. English
            2. Spanish

      Note: Designed Promotion will only be available for CIV counties at this time.

d. Display 'News Alert' at the bottom of the Lobby Monitor Screen.
   i. If there are more than one 'News Alert' that was created on the 'Lobby Monitor Detail' page it will continue to cycle through at the bottom of the Lobby Monitor Screen.
   ii. If there are no 'News Alert' created on the 'Lobby Monitor Detail' page, blue bar will not appear at the bottom of the Lobby Monitor Screen.
e. Display the customer Number and Associated Location as show on Figure 2.8.2.
   i. Customers Number and Location will display on the left hand side where the 'Office Promotions/Designed Promotions' is located.
      1. Customer Number and Location will display every time the 'Monitor Call icon is click through Message Center or Reception Log Detail page.
      2. Customer Number and Location will display in English, Spanish or both English and Spanish. This will be dependent on the customer preferred language (please refer to the Appendix section for the Language preference matrix).
         a. Language preference will be based on the value selected on the 'Language' field on the Reception Log Detail page; or as documented in the customer's Individual Demographics Detail 'Language' field if there was no value set on the Reception Log Detail page.
         b. If the customer's preferred language is set to English or something other than Spanish, then display only in English.
         c. If the customer's preferred language is Spanish, then display only in Spanish.
            i. This wil be based on the value entered on the 'Location Spanish' field on the Lobby Monitor Detail page.
         d. If the customer's preferred language is not selected (either in Reception Log Detail page or the Individuals Demographics Detail) display in both English and Spanish.

2. Add an Audio Automation for Number calling as part of the 'Lobby Monitoring System'.
    a. Audio Automation will allow the system to call numbers out through the Lobby Monitor System and it will be synchronized with the Lobby Monitor Screen. Audio will play when the Lobby Monitor Screen display the Customer Number and Associated Location (see section 2.8.3.1.c).
        i. Audio will call out the Number and the Location information to the associated Reception Log Record.
            1. Audio will be available in both English and Spanish if the 'Audio On' field is set to 'Yes' under the 'Reception Locations' section of the 'Lobby Monitor Detail' page.
                a. Audio will play in either English, Spanish or both English and Spanish. This will be dependent on the customer preferred language (please refer to the Appendix section for the Language preference matrix).
                    i. Language preference will be based on the value selected on the 'Language' field on the Reception Log Detail page; or as documented in the customer's Individual Demographics Detail 'Language' field if there was no value set on the Reception Log Detail page.
                        1. If the customer's preferred language is set to English or something other than Spanish, then only the English audio will play.
                        2. If the customer's preferred language is Spanish, then ony the Spanish audio will play.
                        3. If the customer's preferred language is not selected (either in Reception Log Detail page or the Individuals Demographics Detail) play both the English and Spanish audio.
            2. Audio will play only if the 'Audio On' field on the 'Lobby Monitor Detail' page is set to 'Yes'.
            3. Audio will play every time the user clicks on the 'Monitor Call' icon either through Message Center or through the Reception Log Detail.

a. Audio will pronounce the information in English when the English version is display.
b. Audio will pronounce the information in Spanish when the Spanish version is display.

Note: If the 'Audio On' field is set to 'No' on the 'Lobby Monitor Detail' page, the Audio will not play even when the user click the 'Lobby Monitor' icon through Message Center or Reception Log Detail page.

3. The supported lobby facing monitor resolution size is 1920 X 1080 which is the standard for 1080p monitors.
4. Lobby Monitor will need to be refreshed or restarted in order to display updates that were made on the Lobby Monitor Detail page.

Note: Chrome is the preferred browser to use for the Lobby Monitoring pages to work properly.

2.8.4 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Lobby Management → Lobby Monitor**
  - **Clicking the hyperlink on the 'Customer Dashboard Link' section of the 'Lobby Monitor Detail' page will open a new window for the worker to display the Lobby Monitoring System for the specified office that they are accessing.**

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

2.9 Update the Responsive Voice to include API key.

2.9.1 Overview

Lobby Monitor functionality uses a third party vendor 'Responsive Voice' for the functionality to call out number for the Lobby Monitor System. Include an API key to the Lobby Monitor Responsive Voice call.

2.9.2 Description of Change

1. Update the Lobby Monitor Responsive Voice call to include the API key in the LRS/CalSAWS system.

2.9.3 Execution Frequency

N/A

2.9.4 Key Scheduling Dependencies

N/A

2.9.5 Counties Impacted

N/A

2.9.6 Data Volume/Performance

N/A

2.9.7 Interface Partner

N/A

2.9.8 Failure Procedure/Operational Instructions

N/A

2.10 Create new web services for Lobby Monitor functionality

2.10.1 Overview

Create new web services for the LRS/CalSAWS system for the Lobby Monitor functionality to work and communicate properly.

2.10.2 Description of Change

1. Create web services in the LRS/CalSAWS to support the Lobby Monitor functionality that is being added to the LRS/CalSAWS system. See Supporting Documents Section 1 for Lobby Monitor web services information.
2. Create a new 'Customer Dashboard Link' to correspond to the new web services and unique for each offices.

2.10.3 Execution Frequency

N/A

2.10.4 Key Scheduling Dependencies

N/A

2.10.5 Counties Impacted

N/A

2.10.6 Data Volume/Performance

N/A

2.10.7 Interface Partner

N/A

2.10.8 Failure Procedure/Operational Instructions

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	List of Web Services that requires to be created in LRS/CalSAWS for the Lobby Monitor functionality.	Attached Document - Lobby Monitor endpoints.xlsx
2	Online	Security Matrix	Attached Document - CA-51740 Security Matrix.xls

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

2.2.2.1	The LRS shall provide a method of tracking the following contacts via the traffic log: a. Face-to-face contacts; d. Inter-County transfer contacts; e. Traffic in the traditional office setting; f. Outreach User contacts in both fixed and non-fixed locations; g. Non-DPSS COUNTY Users; h. Non-COUNTY agencies; i. General public contacts, including e-Government; and j. Other contacts.	Allows tracking of traffic in the traditional office setting.

5 APPENDIX

Reception Log Record Status	Behavior
Waiting	'Monitor Call' icon, 'X' icon, 'Check Mark' icon will display in Reception Log. Message Center will not be present for Waiting Status.
Worker Notified	'Monitor Call' icon, 'Star' icon, 'X' icon, 'Play' icon, and 'Check Mark' icon will display in Reception Log. The 'Monitor Call' icon, 'Star' icon, 'X' icon and 'Check Mark' icon will display in Message Center.
Worker Acknowledged	'Monitor Call' icon, 'Play' icon, 'X' icon and 'Check Mark' icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Worker Acknowledged directly from Message Center). Note: If a worker update the status to Worker Acknowledge from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Lobby Monitor Call	'Monitor Call' icon, 'X' icon, 'Play' icon and 'Check Mark icon will display in both Reception Log and Message Center (this only apply to Message Center if worker updated the status to Lobby Monitor Call directly from Message Center). Note: If a worker update the status to Lobby Monitor Call from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Kiosk Start	No Icons will display in both Reception Log and Message Center.

No Response	No icons will display in both Reception Log and Message Center.
Meeting Started	'Check Mark' icon will display in both Reception Log and Message Center (this only appy to Message Center if worker updated the status to Meeting Started directly from Message Center). Note: If a worker update the status to Meeting Started from Reception Log, there will be no change to the icons that are being displayed in Message Center.
Complete	No icons will display in both Reception Log and Message Center.

LANGUAGE PREFERENCE MATRIX

Reception Log (Language)	Individual Demographics (Language)	Language being display/audio play:
Spanish	Not checked	Spanish
English or Other Than Spanish	Not checked	English
Not Selected	Spanish	Spanish
Not Selected	English or Other than Spanish	English
Not Selected	Not Selected (new applicant)	English and Spanish

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-57974 | CIV-2522

Update EBT Card Detail and EBT Account Detail Pages

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/05/2020	1.0	Initial Version	Jimmy Tu

Table of Contents

1 OVERVIEW

This SCR is a request to close the gap in between C-IV (2522) and LRS/CalSAWS. C-IV already has this functionality and LRS/CalSAWS is being updated to be the same.

1.1 Current Design

1. EBT Account Detail Page:
    a. The Status on the EBT Account Detail Page is decoded information from data provided by the EBT Vendor via a host-to-host message.
    b. The Status Date (in Current Cards Table) is the latest status date in LRS/CalSAWS for an EBT card and is not extracted from the host-to-host message.
2. EBT Card Detail Page:
    a. The CARDHIST Host-to-Host command is not being used in the LRS System.

1.2 Requests

The recommendation is to eliminate the difference between C-IV and LRS/CalSAWS. This will bring LRS/CalSAWS up to the same functionality as C-IV.

1.3 Overview of Recommendations

1. Remove the Status Date column in the Current Cards section of the EBT Account Detail Page.
2. Add an EBT Card Action History section to the EBT Card Detail page.
3. Update Page Mapping to reflect the added and deleted fields

1.4 Assumptions

1. This change is only for the LRS/CalSAWS, this function is already implemented in the C-IV system. This will bring LRS/CalSAWS to the same functionality as C-IV.

2 RECOMMENDATIONS

2.1 EBT Account Detail Page

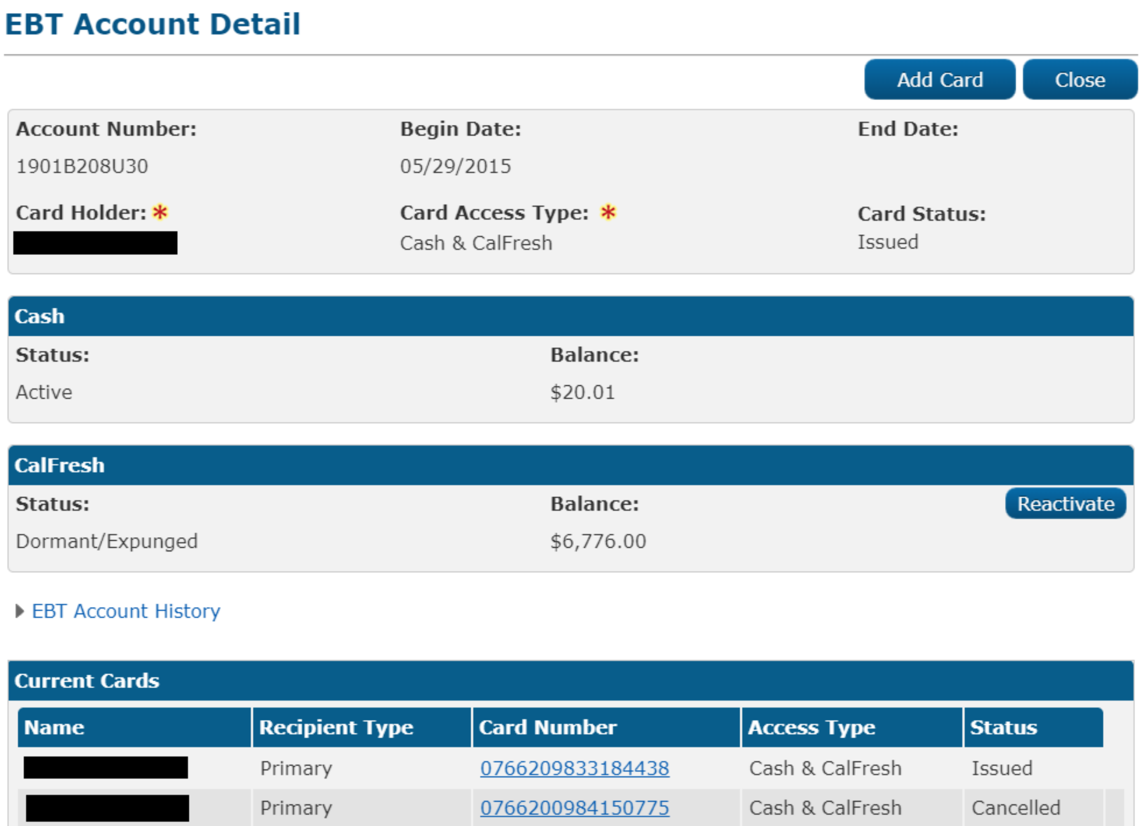
2.1.1 Overview

The EBT Account Detail Page shows basic information about an EBT Account. It details the programs an account is enrolled in, the current cards issued, and their statuses.

Currently, EBT Account Detail Page, displays a new status date every time the EBT Card Detail Page is edited/updated. Displaying the latest of these dates in the Current Cards section (in EBT Account Detail Page) next to the latest card status retrieved from the EBT Vendor could be confusing since the two data points are not always related

2.1.2 Account Detail Page Mockup

Figure 2.1.1 – Account Detail Page Mockup – Status Date Removal



2.1.3 Description of Changes

1. Remove the Status Date column in the Current Cards section of the EBT Account Detail page.

2.1.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

1. On the Page Mapping for the EBT Account Detail page, remove the following fields:
    a. Status Date - EBT_CARD_DETL - STAT_DATE
    b. Status Date – EBT_ACCT_TYPE_DETL – STAT_DATE

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 EBT Card Detail Page

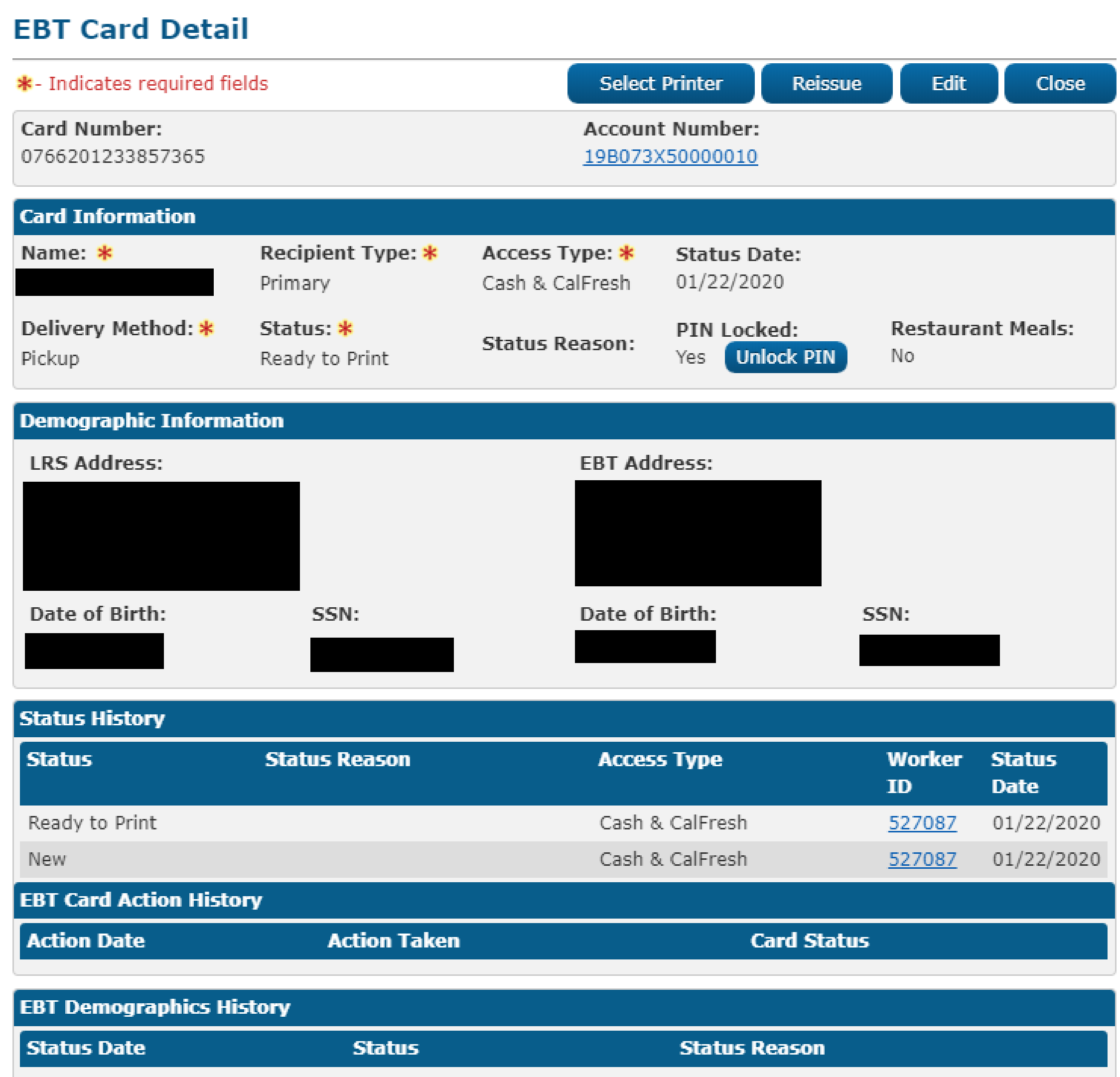
2.2.1 Overview

The EBT Card Detail Page shows basic information for EBT Cards. It shows card information, demographic information, status history, and demographic history.

This page is being updated to include an EBT Card Action History section to track all changes made to an EBT Card. This will keep track of dates and changes so we can remove the Status Date field from the Current Cards section on the EBT Account Detail Page.

2.2.2 EBT Card Detail Page Mockup

Figure 2.1.2 – EBT Card Detail Page – Adding EBT Card Action History Table



2.2.3 Description of Changes

1. Add an EBT Card Action History section to the EBT Card Detail page.
   a. This section will contain a list of the EBT Card actions performed on the EBT card.
   b. This information will be retrieved from the EBT Vendor via Host-to-Host messages.
   c. The list will be in chronological order from newest to oldest.
   d. The table will contain the following fields:
      i. Action Date - The date when the action occurred, as provided by the EBT Vendor.
      ii. Action Taken - Description of the specific action taken.

    1. This description is defined by the EBT Vendor
  iii. Card Status - Card Status at the time of the action.
    1. The status is a decoded value of the status provided by the EBT Vendor.

2.2.4 Page Location

- **Global: Fiscal**
- **Local: EBT**
- **Task: EBT Account List**

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping

4. Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.6 Page Mapping

1. For EBT Card Detail page, add the following fields:
   a. Action Date
      i. This field displays the date the action occurred, as provided by the EBT Vendor.
   b. Action Taken
      i. This field displays the action taken, as provided by the EBT Vendor.
   c. Card Status

i. 2062 - This field displays the card status at the time of the action, as provided by the EBT Vendor.

2.2.7 Page Usage/Data Volume Impacts

None.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.14.3.4	The LRS shall track and keep a historical record of all benefit issuances, to be displayed to COUNTY-specified Users upon inquiry, including original issuance LRS data, current issuance LRS Data, and all changes made to the issuance.	This requirement is met by updating the EBT Card Detail Page to include an EBT Card Action History section to track all the changes made to the EBT Card.
2.15.1.1	The LRS shall display EBT LRS Data online from EBT Vendor to COUNTY-specified Users, upon inquiry.	This requirement is met by making sure information on the EBT Card Detail Page is retrieved by Host-to-Host messages from the EBT Vendor.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-200366

Migration SCR for CCR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Paul Galloway, Gillian Bendicio, David Wong, Patrick Lombardo, Michael Barillas, Eric Wu, Connor Gorry, William Baretsky
	Reviewed By	Prakash Thota, Ramakrishna Kuchibhotla, Naresh Barsagade, Kapil Santosh, Matthew Warren, Long Nguyen, Eric Chu, Naveen Bhumandla, Priya Sridharan, Raj Devidi, Sunitha Sampathkumar, Shilpa Suddavanda, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/1/2020	.01	Initial Draft	Paul Galloway
9/23/2020	.02	Updated after input from FC Committee	Paul Galloway
10/2/2020	.03	Updated after input from FC Committee: Section 2.7.3 Note; Section 2.9.1; Section 2.10.1; Section 2.10.2 #1.d. and #2.d. validation message text; Section 2.12.2.	Paul Galloway
10/12/20	.04	Updates after input from regions: >Section 2.7.3 #2.d: Corrected fieldname 'Type' to 'Basic Rate'. >Section 2.16.6 changed from "N/A" to statement saying job has not processed any records and should be disabled.	Paul Galloway
11/5/2020	.05	Section 2.11 updated after escalation review to not display validation when SPN is 0000.00.00	Paul Galloway
11/23/2020	.06	Updated field/code table details in: • Migration Impacts • Technical Notes	Brian Munce/ Paul Galloway
11/30/20	.07	Added clarification about how security roles affect display of links in: • Section 2.1.3 • Section 2.2.3 1. d. i.	Gillian Bendicio

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
12/2/20	1.01	Content Revision 1: • Added "Foster Family Home-Shelter Care" to Auto Regression test Section 2.25.2 Item 2 b. iv. • Updated FC EDBC so SCIs can pay on FFA placements. See highlighted changes in sections 1.1, 1.3, and 2.9. • Added section: 2.26 Client Correspondence - Regression Test SCI FFA NOAs • Clarified validation of non-numeric values in numeric fields in Section 2.3.3 • Corrected reference to 'Back' button to say 'Close' button in two instances in Section 2.3.3	• William Baretsky • Paul Galloway • Connor Gorry • Gillian Bendicio
12/17/20	1.01.1	Design Clarification • Added note in section 2.26 that an identified fragment is turned off in LRS, and cannot be regression tested	Connor Gorry
12/30/20	1.02	Content Revision 2: • In section 2.7.1 and 2.7.3 remove 'Standard State Rate' from Type field dropdown for new 'Foster Family Agency' placement type. • Remove reference to 'Standard State Rate' for FFA placements in Section 2.9.1 Overview, and Section 2.25.2 item 4, iii.	Paul Galloway

Table of Contents

1 OVERVIEW

The Continuum of Care Reform (CCR) was implemented in CalSAWS and C-IV through a series of SCR's starting in 2016. To comply with CCR policy changes, updates were made for Foster Care (FC), Kin-GAP (KG), and the Adoption Assistance Program (AAP) in both systems in areas of online data collection, EDBC, the FC Resource Databank, fiscal processes, reports, the DCFS FC Inbound Reader Interface, and Client Correspondence.

1.1 Current Design

- In C-IV the Foster Care Facility Ratios pages were modified to accept new types of sharing ratios for CCR rates, and for the new STRTP placement type. In LRS/CalSAWS the Foster Care Facility Ratios pages only display rates for Group Homes and Foster Family Agencies without an option to update them with newer information and types.
- In C-IV the State Program Number (SPN) was moved from the Foster Care License Detail page to the Foster Care Resource Detail page and a Type field (non-ISFC or ISFC) was added. Only certain types can have an ISFC SPN. SPN is required for certain placement types.
  In LRS/CalSAWS a single SPN for a resource can be entered on the FC License Detail page.
- C-IV added a Type field on the license pages (values: ISFC, STRTP, RFA, pre-RFA) to help the transition to the new CCR rate structures and facility types. EDBC validations were also added that require an ISFC or STRTP license type when paying ISFC or STRTP rates, respectively.
  LRS/CalSAWS did not add these License Types or EDBC validations for CCR.
- C-IV added a new resource type of 'Foster Family Agency' (FFA). LRS/CalSAWS did not add that type. LRS/CalSAWS added: 'Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)', and 'Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment).'
- C-IV and LRS/CalSAWS accommodated the new CCR rate structures by adding and renaming fields and adding new dropdown options on the rate pages for Foster Care and Kin-GAP, and by updating EDBC logic to use the new values. The updates added ISFC and Level of Care rates. The systems also allow existing age-based rates to continue for certain placements. The fields and dropdown values differ between the two systems.
- During CCR implementation, C-IV added the ability for workers to enter FC and Kin-GAP rates with Begin Dates and End Dates up to one month in the future. In LRS/CalSAWS those dates can only be after the current system date for AAP.
- At CCR implementation, all Home-Based Foster Care (HBFC) placements moved to a new rate structure except for existing Non-Related Legal Guardian (NRLG) placements:
  - C-IV did a data change to add new records on the Rate Detail page for the new rates on placements that were not NRLG.

    - LRS updated EDBC logic to identify NRLG placements using a matrix of Placement Type and Caregiver Relation to Child values that are considered NRLG to continue paying the older age-based rates to NRLG placements established prior to CCR.
- Kin-GAP placements in C-IV and LRS were moved to the new CCR rate schedule by EDBC if the Case Dismissal Date on the Kin-GAP Summary was 1/1/2017 or later.
- C-IV and LRS added validations on the rate pages to prevent workers from saving CCR rate selections with Begin Dates prior to CCR implementation.
- C-IV allows Standard, Non Standard, and Dual Agency rates for 'Out of State Basic' placements. LRS/CalSAWS only allows Non Standard rates for that placement type.
- C-IV and LRS/CalSAWS both added functionality to record the 'Rate Structure' on EDBC results for FC, KG, and AAP.
- C-IV updated the Infant Supplement payment calculation to pay the new STRTP placement type like Group Homes. LRS did not make this update because the Additional Rate page is used for Infant Supplement.
- C-IV added validations that prevent EDBC from running on FC programs where a Placement Authority is Non-Related Legal Guardianship and certain rates exist. LRS determines NRLG placements differently and did not implement these validations.
- C-IV's LOC reason NOA fragments generate under different Action Types and conditions than their corresponding fragments in LRS/CalSAWS.
- CIV-12488 updated FC EDBC in C-IV to pay Special Care Increments (SCI's) for eligible Foster Family Agency (FFA) placements.

1.2 Requests

Designs were not made jointly between C-IV and LRS/CalSAWS at the time, and there are differences in how CCR was implemented that need to be addressed prior to migration of C-IV into LRS/CalSAWS.

1.3 Overview of Recommendations

1. Replace the Foster Care Facility Ratio Detail page in LRS/CalSAWS with page designs like the Foster Care Facility Ratio List and Detail pages in C-IV, including the side task navigation. Some modifications will be made when importing the page designs because LRS/CalSAWS allows for multiple placement types on each resource.
2. All existing Foster Care Ratio Detail data in LRS was loaded into the system when DCFS converted into LRS and is outdated and will not be maintained when these page updates are implemented.
3. Remove the State Program Number field from the Foster Care License Detail page in LRS/CalSAWS.
4. All Existing State Program Number data in LRS is outdated and it will not be maintained when this page is updated.
5. Add the State Program Number field to the Foster Care Resource Detail page to capture both ISFC and non-ISFC types. Because LRS/CalSAWS allows for

multiple placement types on a resource, the layout will be modified slightly from C-IV. Two columns for entering State Program numbers (one for ISFC and one for non-ISFC) will be added next to the list of placement types. The ISFC State Program Number field can only be entered for certain placement types.

6. DDID 2096 requests that a State Program Number be required for certain placement types. That DDID was marked Obsolete and the request is included in this SCR.
7. The DCFS FC Inbound Reader Interface will be updated to set the non-ISFC State Program Number to a placeholder value of 0000.00.00 (because the State Program Number is not available in the interface) for any placement type added to a new or existing LA resource if the placement type is one of those that requires a State Program Number. The interface will also be updated to accommodate the new table structure.
8. The license pages in LRS/CalSAWS will not be modified to store the type values (ISFC, STRTP, RFA, and pre-RFA) added to C-IV for CCR transition. Converted licenses will display the License Type from C-IV in the Comments field on the FC License Detail page.
9. Add a soft validation for FC EDBC when an ISFC rate is selected and the State Program Number of the placement resource does not indicate that it should be paid ISFC rates.
10. The placement type 'Foster Family Agency' (FFA) will be added as a selection on the Foster Care Resource Detail page. The Child Placement Detail and Rate Detail pages will be updated to handle the new placement type and provide the appropriate rate selections. EDBC will be updated, too.
11. The Foster Care and Kin-GAP Rate Detail pages will be updated to allow workers to save rates with Begin Dates and End Dates up to one month in the future from the current system date.
12. Add 'Standard State Rate' and 'Dual Agency' to the 'Type' dropdown on the FC Rate Detail page when the placement type is 'Out of State Basic'.
13. Soft validations will be added to the Run EDBC page to alert workers when a Placement Authority is Non-Related Legal Guardianship and:
    a. Probate Court established the guardianship and the rate is an ISFC rate or LOC 2, LOC 3, or LOC4; or,
    b. Juvenile court established the guardianship and the rate is an ISFC rate.
14. Update Fiscal batch and Interface jobs to read the State Program Number from the new tables where the fields are stored.
15. Update the generation conditions for CCR-related NOAs.
16. Update verbiage for the Supplemental Care Increment Change NOA.
17. Update FC EDBC to include FFA placements as a placement type that can be paid SCI's, effective 3/1/2018.
18. Regression test SCI NOA fragments for the newly added FFA placement type.

1.4 Assumptions

1. Differences in rate dropdown selections on the Foster Care and Kin-GAP Rate Detail pages will not require system changes in this SCR. Conversion will move the values into the corresponding fields in LRS/CalSAWS to pay the equivalent rate levels through CCC-1572 and other conversion tasks.

2. EDBC for Kin-GAP in C-IV and LRS/CalSAWS both use the same logic (Case Dismissal Date prior to 1/1/2017) to determine if a case is eligible to CCR or pre-CCR rates. No change is needed.
3. The Date-Picker calendar on the KG Rate Detail page already allows Begin and End Dates in the future and does not need to be updated like the one on the FC Rate Detail page that is being updated in this SCR.
4. LA will not begin using the new ‘Foster Family Agency’ (FFA) placement type because it is not an available selection in CWS/CMS. Therefore, no LA interface or LA claiming updates are being made for the new placement type at this time.
5. Although ‘Standard State Rate’ and ‘Dual Agency’ rates are being added to the ‘Type’ dropdown on FC Rate Detail for the placement type ‘Out of State Basic’, no EDBC updates are required. Existing EDBC logic will pay the Basic CCR rate for Standard State Rate, or the appropriate Dual Agency rate if one is selected.
6. LRS/CalSAWS EDBC needs to be able to determine which converted cases are NRLG to continue paying pre-CCR placements from the age-based rate schedules. That is being addressed in SCR CA-207166/DDID 2116.
7. AAP is an automated eligibility program in LRS/CalSAWS. AAP is a manual eligibility program in C-IV. Changes for CCR were made in LRS/CalSAWS for AAP, but no updates are necessary in this SCR because the migrating C-IV counties are adopting the existing LRS/CalSAWS design.
8. No additional validations will be added to those already in LRS/CalSAWS that prevent CCR rates being created for dates prior to when the policies were implemented since those benefit months are well in the past now.
9. No change is made here to pay the higher Infant Supplement rate to STRTP placements. That is addressed in SCR CA-215442.
10. There will be no functional change to the DCFS FC Inbound Reader Interface.
11. Changes in this SCR to the tables holding FC Sharing Ratio and State Program Number data will affect reports that access that data. DDID 1057 & DDID 1056 will capture the discrepancies between C-IV and LRS/CalSAWS when the reports are re-platformed to CalSAWS.
12. Existing page components and logic not mentioned in this SCR will retain their current functionalities.
13. The existing ‘Foster Care Facility View’ and ‘Foster Care Facility Edit’ security groups and their associated right and role mappings will not be modified by this SCR.
14. Change made to generate Countable Income, Infant Supplement, and SCI Approval NOAs will not affect current generation conditions that generate these NOAs for Change and Supplement actions.

2 RECOMMENDATIONS

2.1 Foster Care Facility Ratio Side Navigation

2.1.1 Overview

The side navigation bar highlights the page the user has currently selected. In LRS/CalSAWS, Foster Care Facility Ratios will be highlighted when the user navigates to Foster Care Facility Ratio List and Foster Care Facility Ratio Detail and all the FC Resource Databank options will display.

2.1.2 Side Navigation Mockup

2.1.3 Description of Change

1. 'Foster Care Facility Ratios' will be highlighted when the user navigates to the Foster Care Facility Ratio List or Detail page. When the user is on one of those two pages, the list of options shown here will display so they can access other information for the current resource or perform another Foster Care Resource Search. Foster Care Facility Ratio will

only display in task navigation when the user has the security right to view the Foster Care Facility Ratio List page.

2.1.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Facility Ratio**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Foster Care Facility Ratio List Page

2.2.1 Overview

The Foster Care Facility Ratio List page displays all Facility Ratio records for a resource. The page exists in C-IV but not in LRS/CalSAWS. This page is accessed by clicking side navigation link Foster Care Facility Ratios when in the context of a FC Resource Databank resource. This page will navigate the worker to the Foster Care Facility Ratio Detail page.

2.2.2 Foster Care Facility Ratio List Mockup

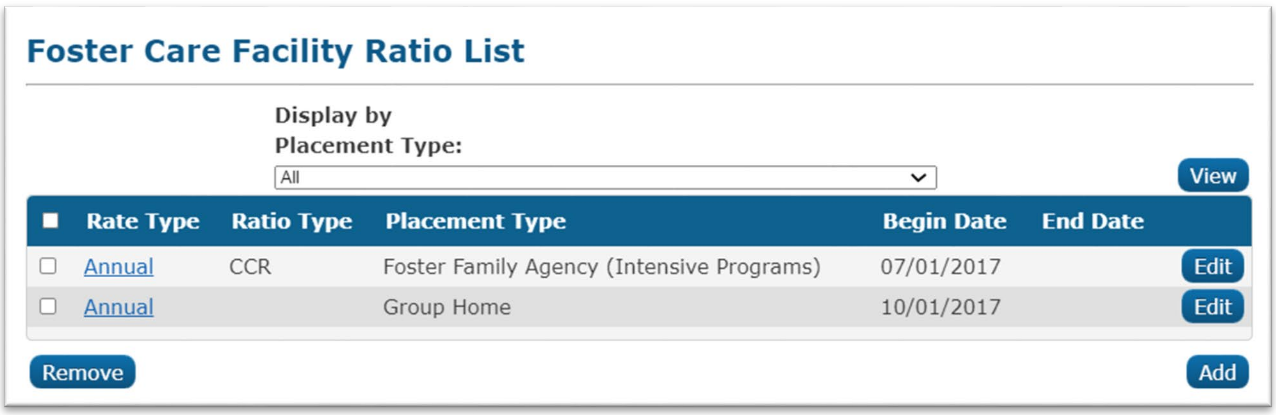


Figure 2.2.1 – Foster Care Facility Ratio List

2.2.3 Description of Changes

1. Create the 'Foster Care Facility Ratio List' page with the following components (Refer to the Appendix for Technical Notes including Reference Code Tables for page display options):
    a. 'Display by Placement Type' dropdown
        i. This dropdown will be populated with 'All' plus a list of the placement types for the resource from the Foster Care Resource Detail page.
        ii. Upon loading the page, 'All' is selected and all ratio records for the resource will display. The records are sorted alphabetically by Placement Type and descending Begin Date.
    b. 'View' button
        i. When the user clicks this button, the page will reload with records that have a Placement Type matching the option selected in the 'Display by Placement Type' dropdown, or all records if 'All' is selected.

c. Checkbox Column
    i. Clicking the checkbox on the header section of the table will mark all checkboxes on the results table.
    ii. Clicking the checkbox associated to a record(s) will delete the record(s) when the user clicks the 'Remove' button.
d. 'Rate Type' column
    i. The values under this column can be 'Annual' or 'Supplemental'. They display as a hyperlink when the user has the security right to view the FC Facility Ratio Detail page. Clicking the hyperlink will navigate the user to the FC Facility Ratio Detail page of the corresponding record in View mode.
e. 'Ratio Type' column
    i. The values under this column can be blank, 'CCR' or 'Non-CCR'.
        1. 'CCR' and 'Non-CCR' will only display if the placement type is one that can have both types of rates (see Appendix: Placement Type to Ratio Detail Page Mode Mapping):
            a. Foster Family Agency (Intensive Programs)
            b. Foster Family Agency (Treatment)
            c. Foster Family Agency (Nontreatment)
            d. Multidimensional
f. 'Placement Type' column
    i. This column will display the placement type linked to the facility ratio record.
g. 'Begin Date' column
    i. This column will display the begin date of the record.
h. 'End Date' column
    i. This column will display the end date of the record.
i. 'Edit' button
    i. Clicking this button will navigate the user to the Foster Care Facility Ratio Detail page of the corresponding record in Edit mode. The user will need the appropriate edit right to access this button.
j. 'Add' Button:
    i. Clicking this button will navigate the user to the Foster Care Facility Ratio Detail page in Create mode. The user will need the appropriate edit right to access this button.
k. 'Remove' Button:
    i. Clicking this button will remove the selected Foster Care Facility Ratio records. The user will need the appropriate remove right to access this button.

2. If there are no Foster Care Facility Ratio records that match the view criteria, the result table will display 'No data found.'.

2.2.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Facility Ratio**

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
FosterCareFacilityRatioRemove	Remove ability on the Foster Care Facility Ratio List	Foster Care Facility Remove
FosterCareFacilityRatioListEdit	Add/Edit ability on the Foster Care Facility Ratio List	Foster Care Facility Edit
FosterCareFacilityRatioListView	View ability on the Foster Care Facility Ratio List	Foster Care Facility View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Foster Care Facility Remove	Gives the user the ability to remove a Foster Care Facility Ratio record.	Fiscal Supervisor
Foster Care Facility Edit	Gives the user the ability to create, edit, and view a Foster Care Facility Ratio record.	Fiscal Supervisor
Foster Care Facility View	Gives the user the ability to view a Foster Care Facility Ratio record.	Collections Staff, Eligibility Staff, Eligibility Supervisor, Executive, Help Desk Staff, Oversight Agency Staff, Special Investigations Staff, Special Investigations Supervisor

2.2.6 Page Mapping

Create the page mapping to include this page.

2.2.7 Page Usage/Data Volume Impacts

Approximately 2,000 records are created per year.

2.3 Foster Care Facility Ratio Detail Page

2.3.1 Overview

The Foster Care Facility Ratio Detail page allows the worker to record and view the sharing ratios for a resource. This SCR will take the existing C-IV system solution and update it to accommodate multiple placement types for a resource. The page is accessed from the Foster Care Facility Ratio List page in various modes depending on the link or button clicked on that page.

2.3.2 Foster Care Facility Ratio Detail Mockup

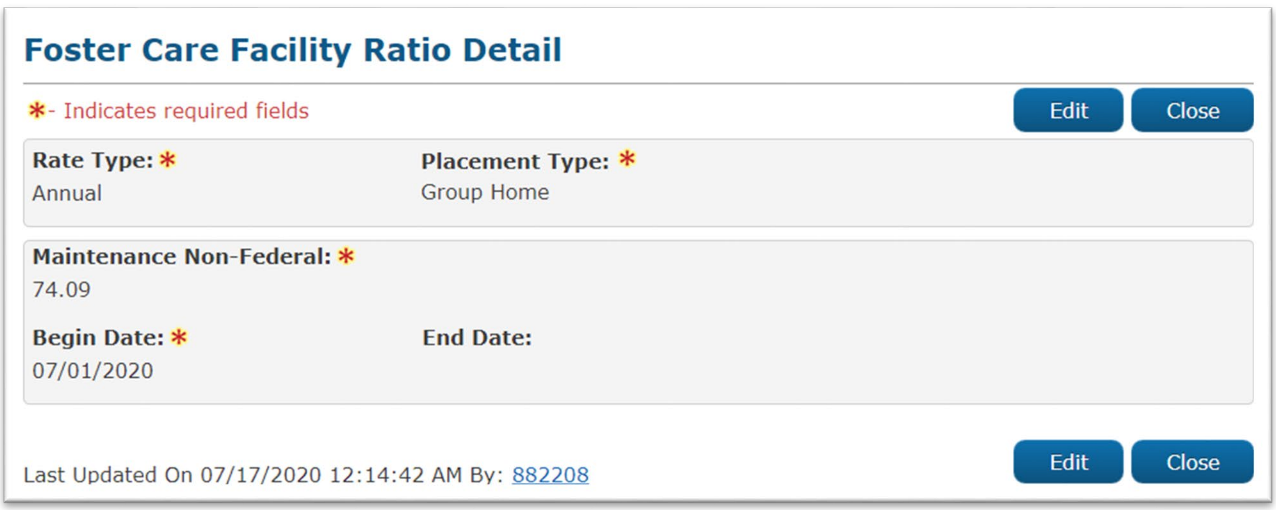


Figure 2.3.1 – Foster Care Facility Ratio Detail/View Mode/Single Ratio Resource

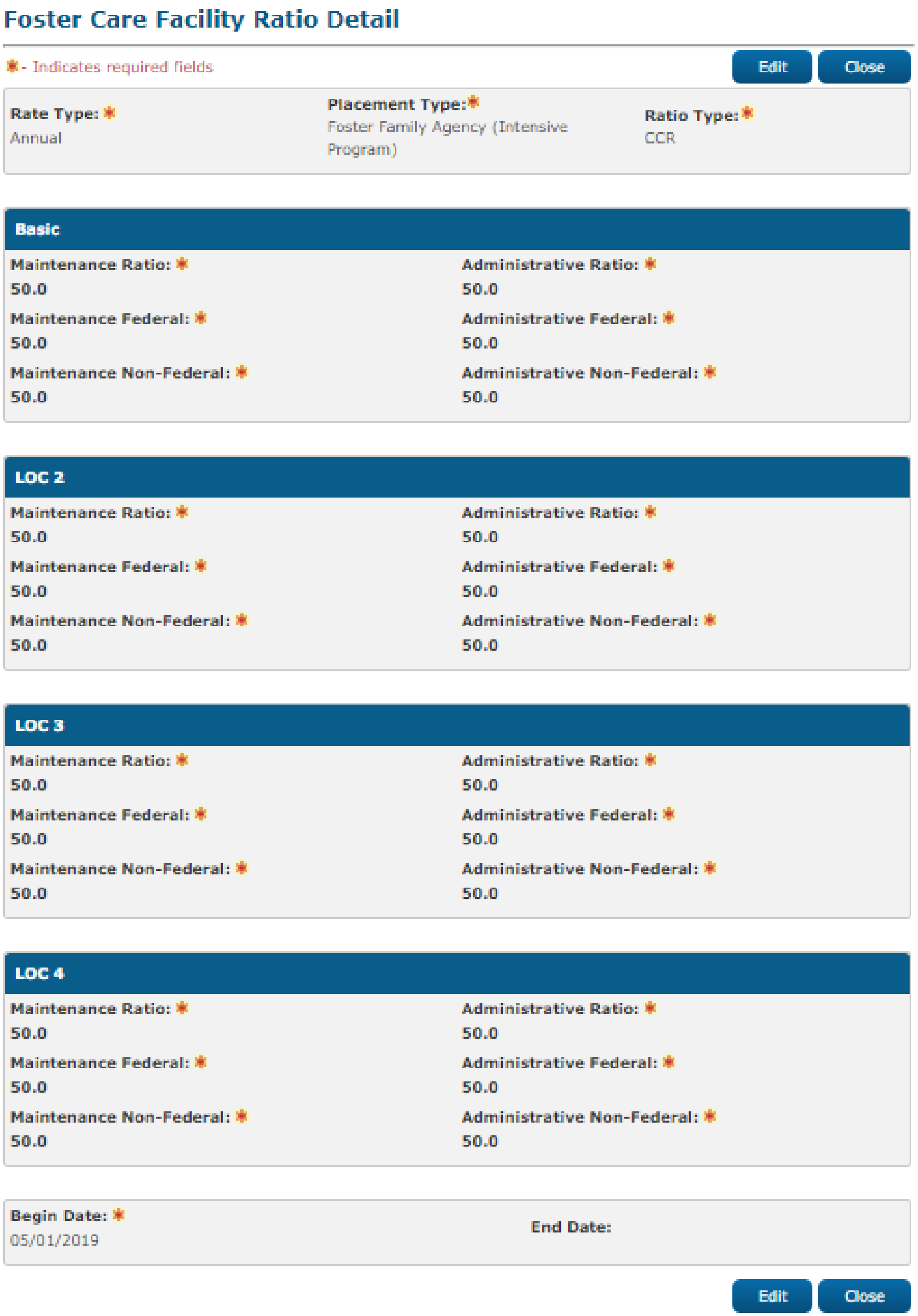
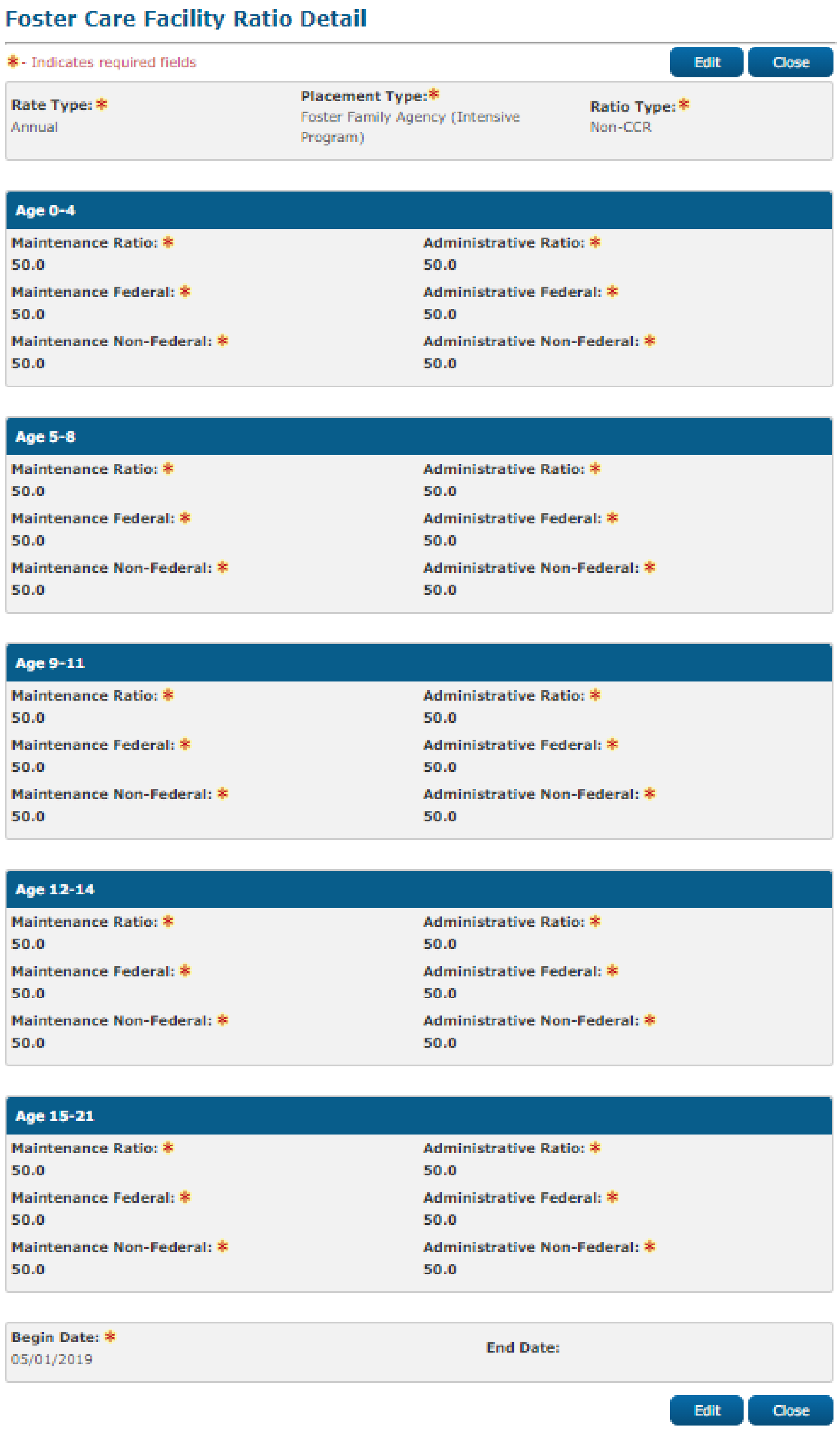


Figure 2.3.2 – Foster Care Facility Ratio Detail/View Mode/CCR Ratios



Foster Care Facility Ratio Detail

*- Indicates required fields

Edit Close

Rate Type: * Annual	**Placement Type:** * Foster Family Agency (Intensive Program)	**Ratio Type:** * Non-CCR

Age 0-4

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

Age 5-8

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

Age 9-11

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

Age 12-14

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

Age 15-21

Maintenance Ratio: * 50.0	**Administrative Ratio:** * 50.0
Maintenance Federal: * 50.0	**Administrative Federal:** * 50.0
Maintenance Non-Federal: * 50.0	**Administrative Non-Federal:** * 50.0

Begin Date: * 05/01/2019	**End Date:**

Edit Close

Figure 2.3.3 – Foster Care Facility Ratio Detail/View Mode/Non-CCR Ratios

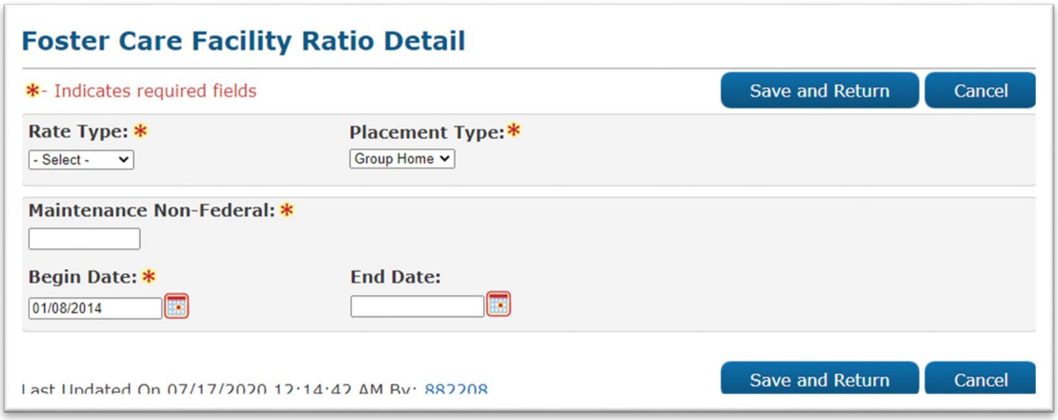
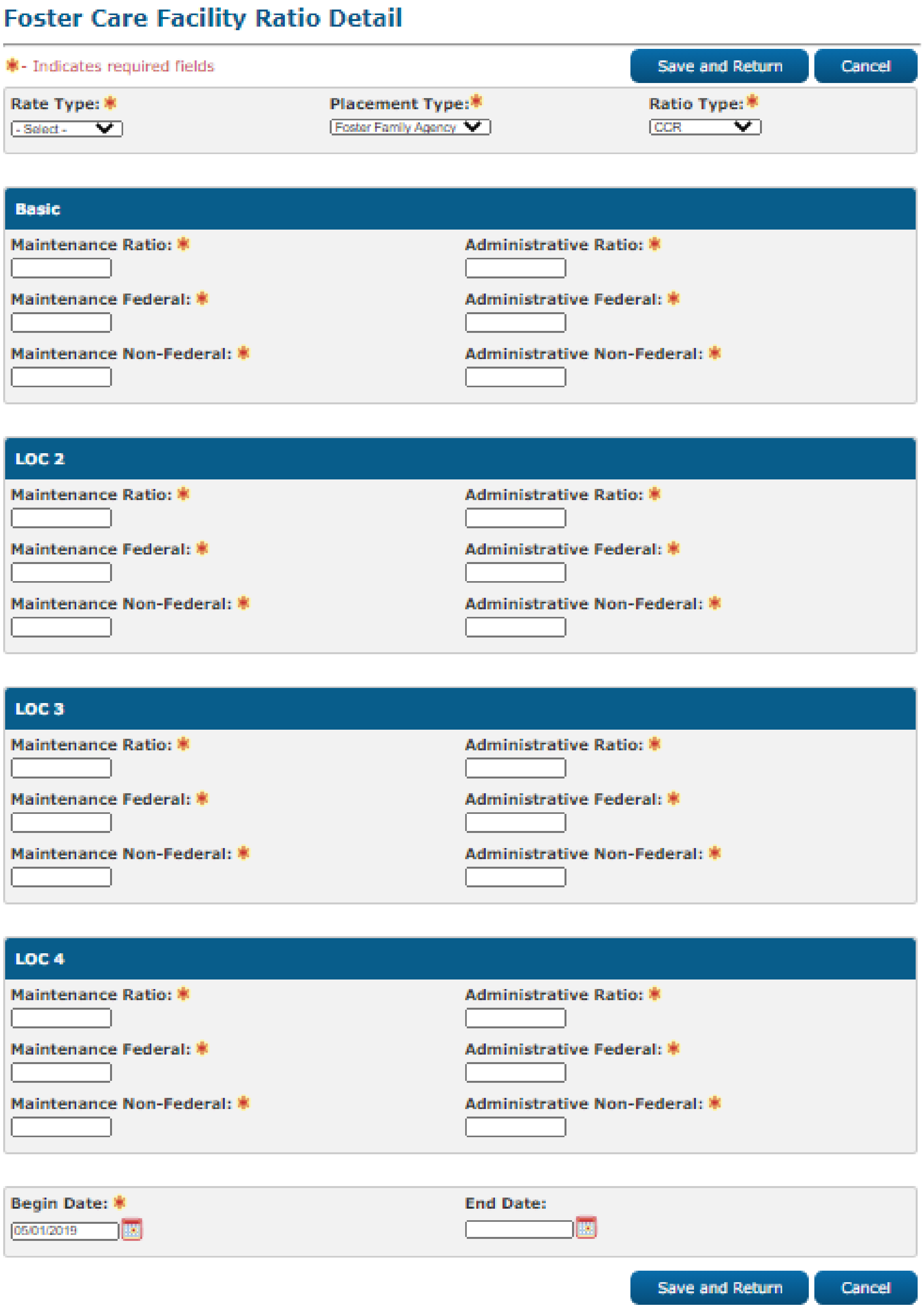


Figure 2.3.4 – Foster Care Facility Ratio Detail/Create Mode/Single Ratio Resource



Foster Care Facility Ratio Detail

*- Indicates required fields

Save and Return | Cancel

Rate Type: * - Select -

Placement Type: * Foster Family Agency

Ratio Type: * CCR

Basic

Maintenance Ratio: *

Administrative Ratio: *

Maintenance Federal: *

Administrative Federal: *

Maintenance Non-Federal: *

Administrative Non-Federal: *

LOC 2

Maintenance Ratio: *

Administrative Ratio: *

Maintenance Federal: *

Administrative Federal: *

Maintenance Non-Federal: *

Administrative Non-Federal: *

LOC 3

Maintenance Ratio: *

Administrative Ratio: *

Maintenance Federal: *

Administrative Federal: *

Maintenance Non-Federal: *

Administrative Non-Federal: *

LOC 4

Maintenance Ratio: *

Administrative Ratio: *

Maintenance Federal: *

Administrative Federal: *

Maintenance Non-Federal: *

Administrative Non-Federal: *

Begin Date: * 05/01/2019

End Date:

Save and Return | Cancel

Figure 2.3.5 – Foster Care Facility Ratio Detail/Create Mode/CCR Ratios

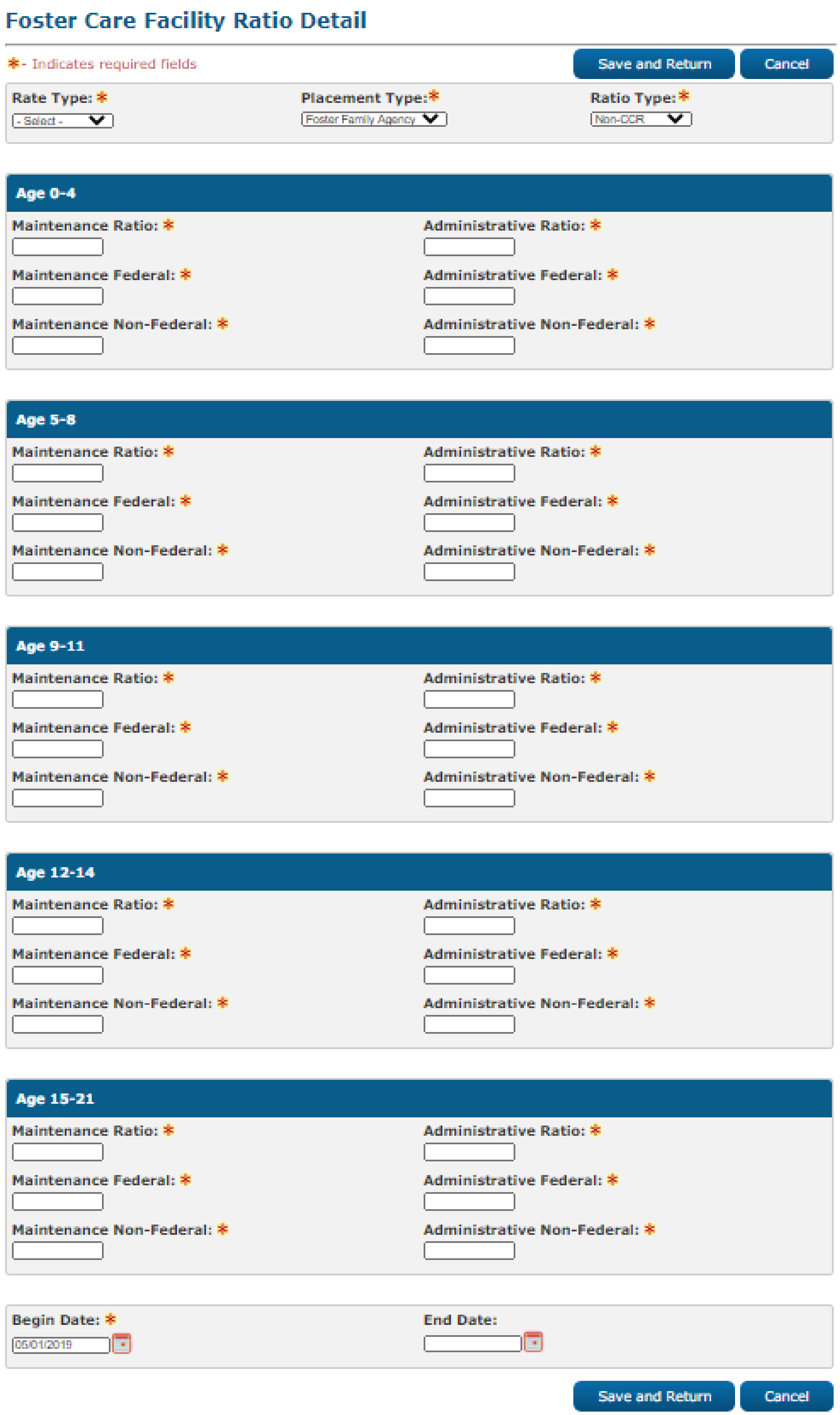


Figure 2.3.6 – Foster Care Facility Ratio Detail/Create Mode/Non-CCR Ratios

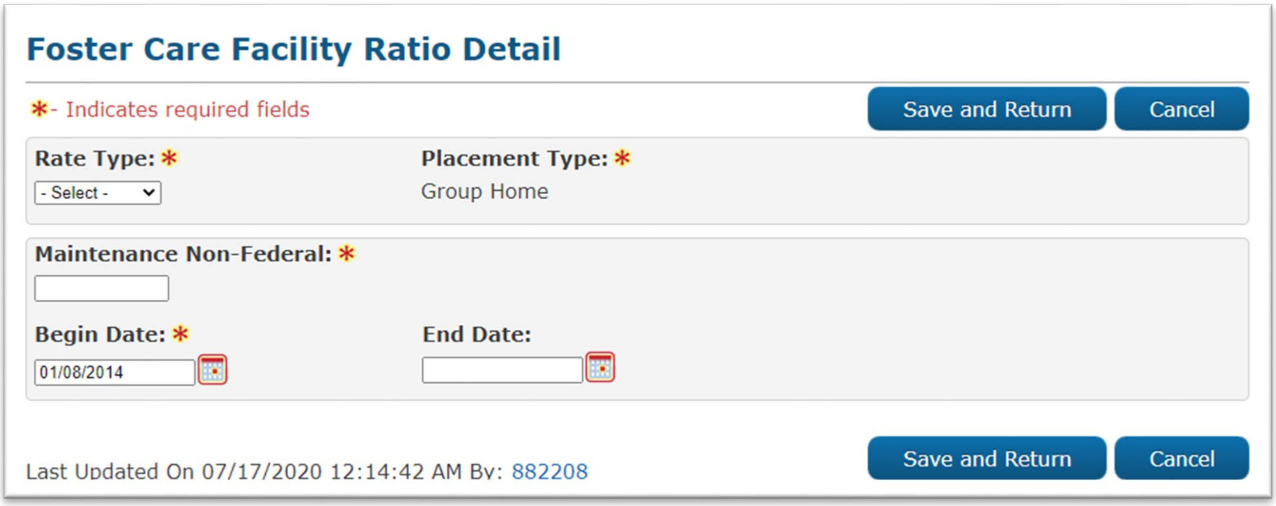


Figure 2.3.7 – Foster Care Facility Ratio Detail/Edit Mode/Single Ratio Resource

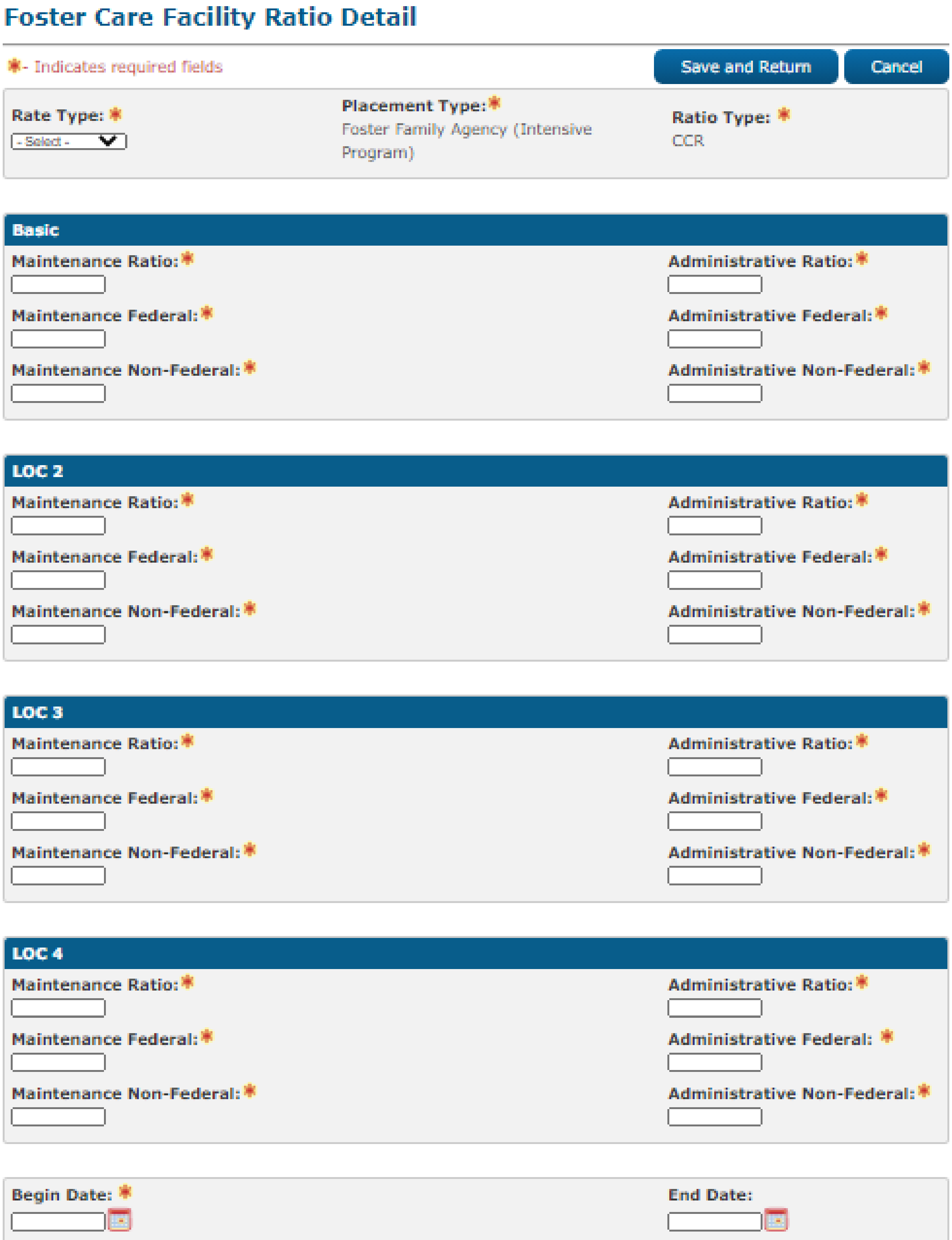
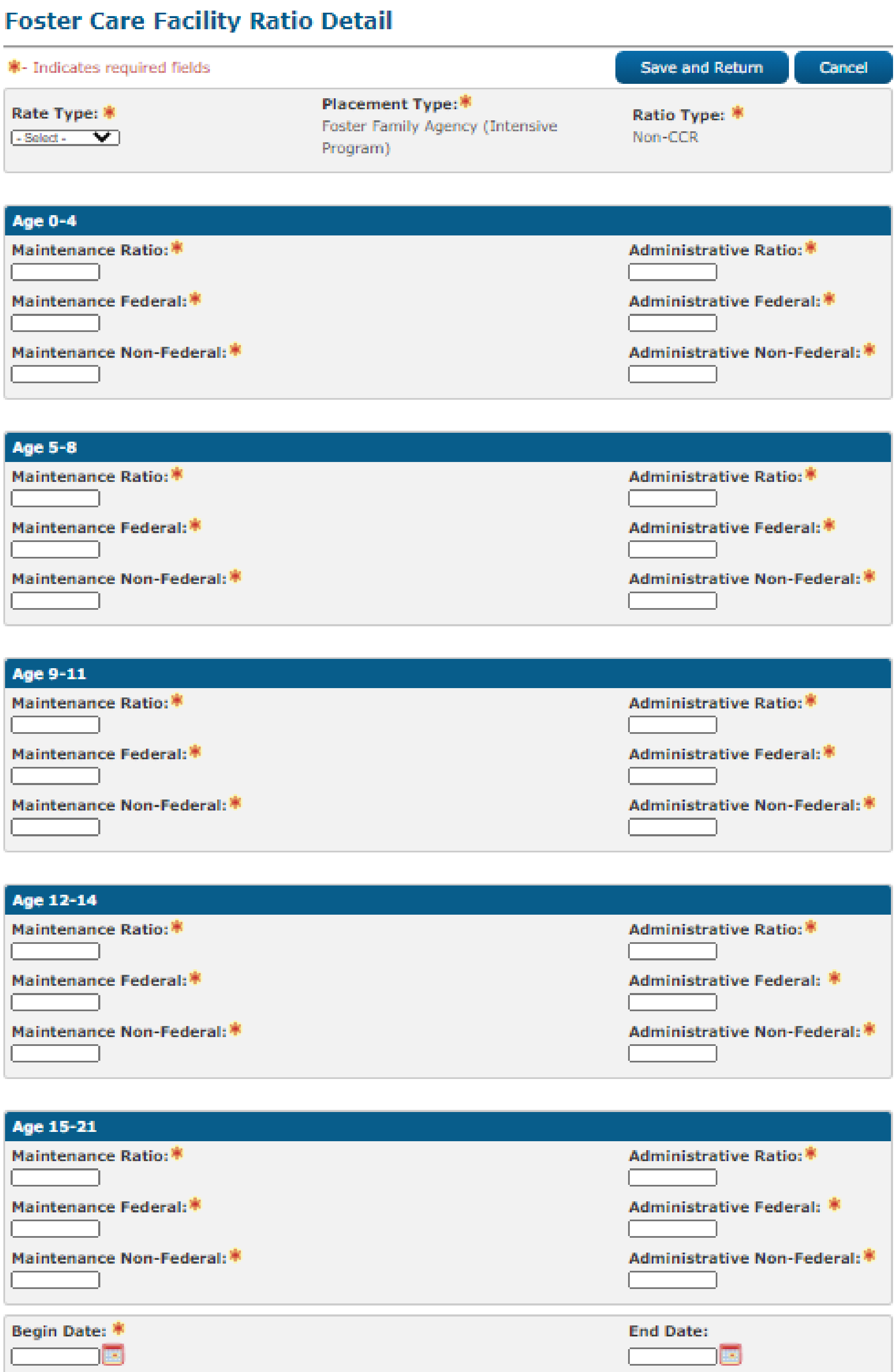


Figure 2.3.8 – Foster Care Facility Ratio Detail/Edit Mode/CCR Ratios



Foster Care Facility Ratio Detail

*- Indicates required fields

Save and Return | Cancel

Rate Type:* - Select -

Placement Type:* Foster Family Agency (Intensive Program)

Ratio Type:* Non-CCR

Age 0-4

Maintenance Ratio:* | Administrative Ratio:*

Maintenance Federal:* | Administrative Federal:*

Maintenance Non-Federal:* | Administrative Non-Federal:*

Age 5-8

Maintenance Ratio:* | Administrative Ratio:*

Maintenance Federal:* | Administrative Federal:*

Maintenance Non-Federal:* | Administrative Non-Federal:*

Age 9-11

Maintenance Ratio:* | Administrative Ratio:*

Maintenance Federal:* | Administrative Federal:*

Maintenance Non-Federal:* | Administrative Non-Federal:*

Age 12-14

Maintenance Ratio:* | Administrative Ratio:*

Maintenance Federal:* | Administrative Federal:*

Maintenance Non-Federal:* | Administrative Non-Federal:*

Age 15-21

Maintenance Ratio:* | Administrative Ratio:*

Maintenance Federal:* | Administrative Federal:*

Maintenance Non-Federal:* | Administrative Non-Federal:*

Begin Date:* | End Date:

Figure 2.3.9 – Foster Care Facility Ratio Detail/Edit Mode/Non-CCR Ratios

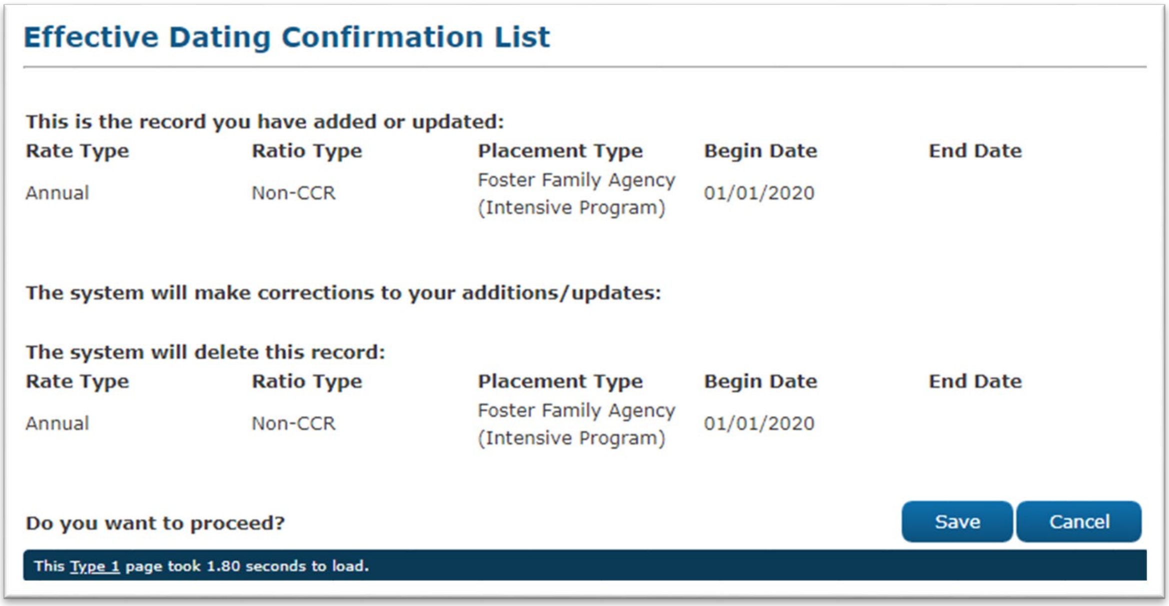


Figure 2.3.10 – Effective Date Confirming List

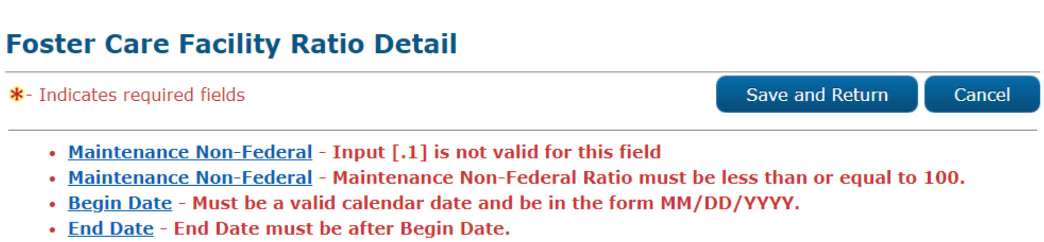


Figure 2.3.11 – Foster Care Facility Ratio Detail Validation Message

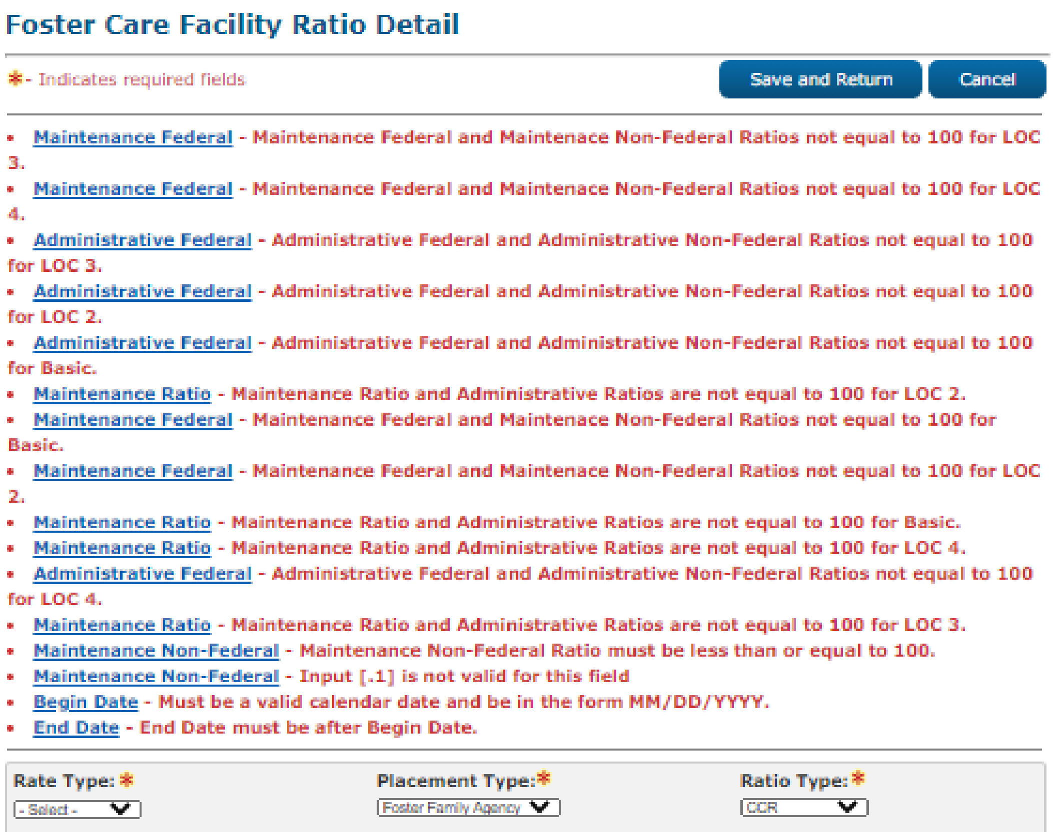


Figure 2.3.12 – Foster Care Facility Ratio Detail Validation Message

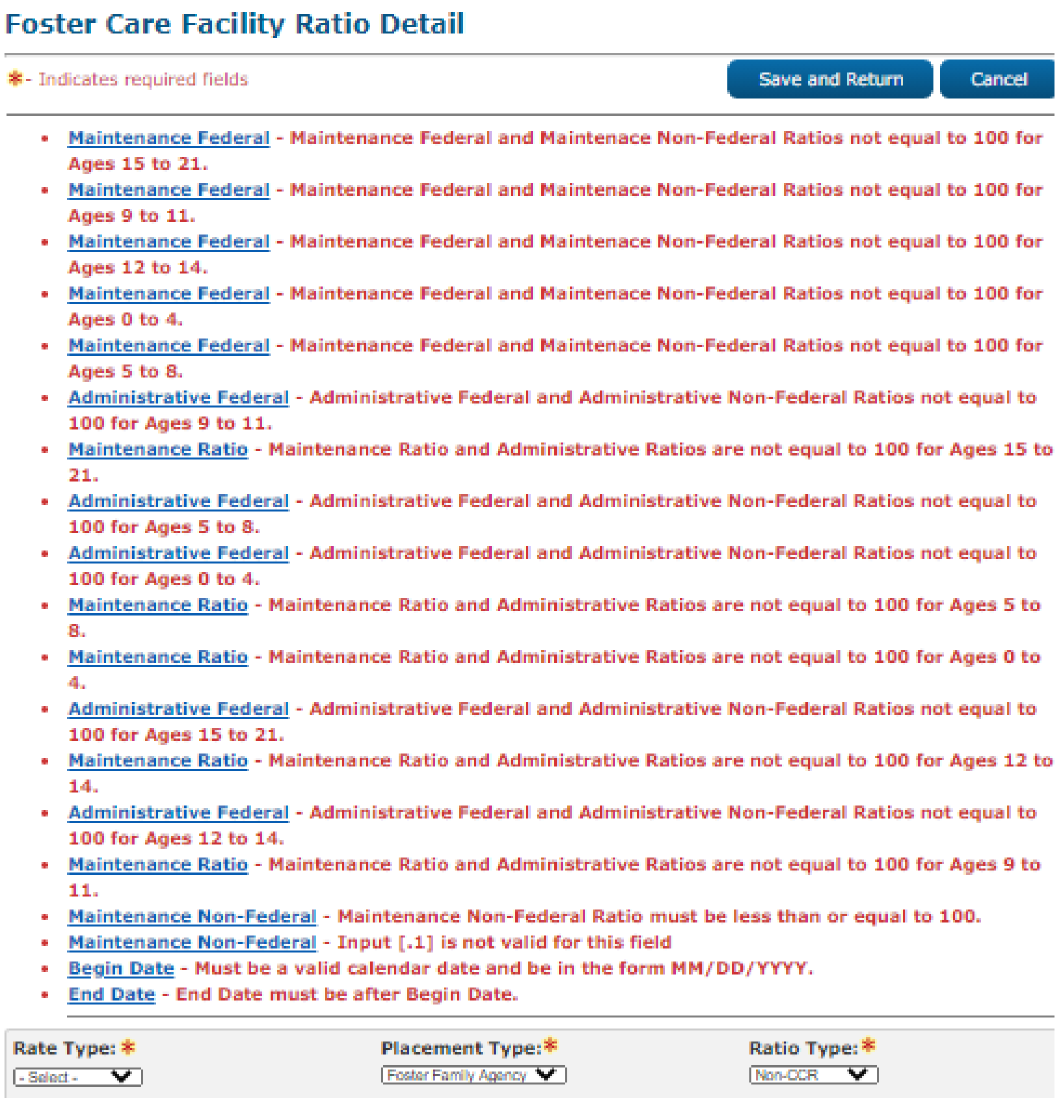


Figure 2.3.13– Foster Care Facility Ratio Detail Validation Message

2.3.3 Description of Changes

1. Create the Foster Care Facility Ratio Detail pages as shown in the figures above. This page will automatically refresh depending on the placement type and/or ratio type that the user selects.
   See Appendix Section:
   - Placement Type to Ratio Detail Page Mode Mapping for page version mapping.
   - Technical Notes for Code Table updates for page display options.

   a. 'Foster Care Facility Ratio Detail' for Single Ratio (as shown in Figures 2.3.1, 2.3.4 and 2.3.7)
      i. This version of the page will load when the placement type is one of the following:

            1. Group Home
            2. Out of State Group Home
            3. Short Term Therapeutic Residential Program
            4. Transitional Housing Placement + FC (THP+FC)
            5. Transitional Housing Placement Program (THPP)
    ii. The page will refresh to the appropriate page version any time a change is made to the 'Placement Type' or 'Ratio Type' dropdown.
    iii. This page will have the following components:
        1. 'Edit' button
            a. Clicking this button will load the page in Edit mode. This button is only available in View mode and the user will need the appropriate edit right to access this button.
        2. 'Close' button
            a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page. This button is only available in View mode.
        3. 'Save and Return' button
            a. Clicking this button will save the information entered by the user. If the information does not conflict with an existing record based on the placement type, ratio type, and dates entered, it will navigate the user back to the Foster Care Facility Ratio List page. Otherwise, it will navigate the user to the Effective Dating Confirmation. This button is only available in 'Edit' and 'Create' modes.
        4. 'Cancel' button
            a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page without saving the information. This button is only available in 'Edit' and 'Create' modes.
        5. 'Rate Type' dropdown
            a. This is a required field.
            b. This will have the following options:
                i. Annual
                ii. Supplemental
        6. 'Placement Type' field/dropdown
            a. This is a required field.
            b. This field will be pre-selected with the first value on the dropdown in Create mode.
            c. The dropdown options will contain the placement types linked to the resource listed alphabetically.

d. This field can only be modified in Create mode.

7. 'Ratio Type' field/dropdown
   a. This is a required field when displayed.
   b. This dropdown will have the following options:
      i. CCR
      ii. Non-CCR
   c. This field will dynamically display when the user selects one of the following placement types otherwise, it will be hidden:
      i. Foster Family Agency (Intensive Programs)
      ii. Foster Family Agency (Treatment)
      iii. Foster Family Agency (Nontreatment)
      iv. Multidimensional
   d. This field can only be modified in Create mode.
8. 'Maintenance Non-Federal' field
   a. This is a required numerical field.
   b. If the value entered by the user is not numerical, clicking the 'Save and Return' button will display the following validation:
      i. "<u>Maintenance Non-Federal</u> – Input [value] is not valid for this field."
   c. If the value entered by the user is over 100, clicking the 'Save and Return' button will display the following validation:
      i. "<u>Maintenance Non-Federal</u> – Maintenance Non-Federal Ratio must be less than or equal to 100."
9. 'Begin Date' field
   a. This is a required date field.
10. 'End Date' field
   a. This is a date field.

b. 'Foster Care Facility Ratio Detail' for CCR (as shown in Figures 2.3.2, 2.3.5 and 2.3.8)
   i. This page will load when the ratio type dropdown is 'CCR' or when the placement type is one of the following:
      1. Foster Family Agency
      2. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
      3. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)

ii. The page will refresh to the appropriate page version any time a change is made to the 'Placement Type' or 'Ratio Type' dropdown.

iii. This page will have the following components:

1. 'Edit' button
    a. Clicking this button will load the page in Edit mode. This button is only available in View mode and the user will need the appropriate edit right to access this button.
2. 'Close' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page. This button is only available in View mode.
3. 'Save and Return' button
    a. Clicking this button will save the information entered by the user. If the information does not conflict with an existing record based on the placement type, ratio type, and dates entered, it will navigate the user back to the Foster Care Facility Ratio List page. Otherwise, it will navigate the user to the Effective Dating Confirmation List. This button is only available in 'Edit' and 'Create' modes.
4. 'Cancel' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page without saving the information. This button is only available in 'Edit' and 'Create' modes.
5. 'Rate Type' dropdown
    a. This is a required field.
    b. This will have the following options:
        i. Annual
        ii. Supplemental
6. 'Placement Type' field/dropdown
    a. This is a required field.
    b. This field will be pre-selected with the first value on the dropdown in Create mode.
    c. The dropdown options will contain the placement types linked to the resource.
    d. This field can only be modified in Create mode.
7. 'Ratio Type' field/dropdown
    a. This is a required field when displayed.
    b. This dropdown will have the following options:

        i. CCR
        ii. Non-CCR
    c. This field will dynamically display when the user selects one of the following placement types otherwise, it will be hidden:
        i. Foster Family Agency (Intensive Programs)
        ii. Foster Family Agency (Treatment)
        iii. Foster Family Agency (Nontreatment)
        iv. Multidimensional
    d. This field can only be modified in Create mode.
8. Sections representing the CCR categories with the following details:
    a. Titles representing the CCR rate
        i. Basic
        ii. LOC 2
        iii. LOC 3
        iv. LOC 4
    b. Each section will have the following required numerical fields:
        i. Maintenance Ratio
        ii. Administrative Ratio
        iii. Maintenance Federal
        iv. Administrative Federal
        v. Maintenance Non-Federal
        vi. Administrative Non-Federal
    c. The fields under the sections mentioned above are numerical only fields.
        i. If the value entered by the user is not numerical, clicking the 'Save and Return' button will display the following validation:
        ii. **"<u>[Field Name]</u> – Input [value] is not valid for this field."**
    d. The total Maintenance ratio and Administrative ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
        i. **"<u>Maintenance Ratio</u> - Maintenance Ratio and Administrative Ratios are not equal to 100 for [CCR rate]"**
        ii. [CCR rate] will either be Basic, LOC 2, LOC 3, or LOC 4 whichever section caused the validation to trigger.

e. The total Maintenance Federal ratio and Maintenance Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. **"<u>Maintenance Federal</u> - Maintenance Federal and Maintenance Non-Federal Ratios not equal to 100 for [CCR rate]"**
    ii. [CCR rate] will either be Basic, LOC 2, LOC 3, or LOC 4 whichever section caused the validation to trigger.
f. The total Administrative Federal ratio and Administrative Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. **"<u>Administrative Federal</u> - Administrative Federal and Administrative Non-Federal Ratios not equal to 100 for [CCR rate]"**
    ii. [CCR rate] will either be Basic, LOC 2, LOC 3, or LOC 4 whichever section caused the validation to trigger.

9. 'Begin Date' field
    a. This is a required date field.
10. 'End Date' field
    a. This is a date field.

c. 'Foster Care Facility Ratio Detail' for Non-CCR (as shown in Figures 2.3.3, 2.3.6 and 2.3.8)
    i. This page will load when the ratio type dropdown is populated with the 'Non-CCR' value or the placement type is none of the ones mentioned above.
    ii. The page will refresh to the appropriate page version any time a change is made to the 'Placement Type' or 'Ratio Type' dropdown.
    iii. This page will have the following components:
        1. 'Edit' button
            a. Clicking this button will load the page in Edit mode. This button is only available in View mode and the user will need the appropriate edit right to access this button.
        2. 'Close' button
            a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page. This button is only available in View mode.
        3. 'Save and Return' button

    a. Clicking this button will save the information entered by the user. If the information does not conflict with an existing record based on the placement type, ratio type, and dates entered, it will navigate the user back to the Foster Care Facility Ratio List page. Otherwise, it will navigate the user to the Effective Dating Confirmation List. This button is only available in 'Edit' and 'Create' modes.

4. 'Cancel' button
    a. Clicking this button will navigate the user back to the Foster Care Facility Ratio List page without saving the information. This button is only available in 'Edit' and 'Create' modes.
5. 'Rate Type' dropdown
    a. This is a required field.
    b. This will have the following options:
        i. Annual
        ii. Supplemental
6. 'Placement Type' field/dropdown
    a. This is a required field.
    b. This field will be pre-selected with the first value on the dropdown in Create mode.
    c. The dropdown options will contain the placement types linked to the resource.
    d. This field can only be modified in Create mode.
7. 'Ratio Type' field/dropdown
    a. This is a required field when displayed.
    b. This dropdown will have the following options:
        i. CCR
        ii. Non-CCR
    c. This field will dynamically display when the user selects one of the following placement types otherwise, it will be hidden:
        i. Foster Family Agency (Intensive Programs)
        ii. Foster Family Agency (Treatment)
        iii. Foster Family Agency (Nontreatment)
        iv. Multidimensional
    d. This field can only be modified in Create mode.
8. Sections representing the Age-Based Ratios with the following details:

a. Titles representing the Age-Based Ratios
    i. Age 0-4
    ii. Age 5-8
    iii. Age 9-11
    iv. Age 12-14
    v. Age 15-21
b. Each section will have the following required numerical fields:
    i. Maintenance Ratio
    ii. Administrative Ratio
    iii. Maintenance Federal
    iv. Administrative Federal
    v. Maintenance Non-Federal
    vi. Administrative Non-Federal
c. The fields under the sections mentioned above are numerical only fields.
    i. If the value entered by the user is not numerical, clicking the 'Save and Return' button will display the following validation:
    "[Field Name] – Input [value] is not valid for this field."
d. The total Maintenance ratio and Administrative ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. "**<u>Maintenance Ratio</u> - Maintenance Ratio and Administrative Ratios are not equal to 100 for [Age-Based Ratio]**"
    ii. [Age-Based Ratio] will either be Ages 0-4, Ages 5-8, Ages 9-11, Ages 12-14, or Ages 15-21 whichever section caused the validation to trigger.
e. The total Maintenance Federal ratio and Maintenance Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. "**<u>Maintenance Federal</u> - Maintenance Federal and Maintenance Non-Federal Ratios not equal to 100 for [Age-Based Ratio]**"
    ii. [Age-Based Ratio] will either be Ages 0-4, Ages 5-8, Ages 9-11, Ages 12-14, or Ages 15-21 whichever section caused the validation to trigger.

f. The total Administrative Federal ratio and Administrative Non-Federal ratio entered on the page should equal 100 otherwise, clicking the 'Save and Return' button will trigger the following validation message:
    i. "**Administrative Federal Administrative Federal and Administrative Non-Federal Ratios not equal to 100 for [Age-Based Ratio]**"
    ii. [Age-Based Ratio] will either be Ages 0-4, Ages 5-8, Ages 9-11, Ages 12-14, or Ages 15-21 whichever section caused the validation to trigger.

9. 'Begin Date' field
    a. This is a required date field.
10. 'End Date' field
    a. This is a date field.

2.3.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Facility Ratio**

2.3.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
FosterCareFacilityRatioDetailEdit	The ability to create/edit a Foster Care Facility Ratio record.	Foster Care Facility Edit
FosterCareFacilityRatioDetailView	The ability to view a Foster Care Facility Ratio record.	Foster Care Facility View

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Foster Care Facility Edit	Gives the user the ability to create, edit, and view	Fiscal Supervisor

Security Group	Group Description	Group to Role Mapping
	a Foster Care Facility Ratio record.	
Foster Care Facility View	Gives the user the ability to view a Foster Care Facility Ratio record.	Collections Staff, Eligibility Staff, Eligibility Supervisor, Executive, Help Desk Staff, Oversight Agency Staff, Special Investigations Staff, Special Investigations Supervisor

2.3.6 Page Mapping

Create the page mapping that captures all fields on this page.

2.3.7 Page Usage/Data Volume Impacts

Approximately 2,000 records will be created per year.

2.4 Foster Care Resource Search Page

2.4.1 Overview

The Foster Care Resource Search page allows the worker to search for a Foster Care resource. One of the search criteria on this page is the State Program Number (SPN). This SCR will update the database table structure to align the C-IV and LRS/CalSAWS Foster Care solution.

2.4.2 Description of Changes

1. Update the page search by State Program Number query to use new database table structure being brought over from C-IV and modified for LRS/CalSAWS.

2.4.3 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Resource Search**

2.4.4 Security Updates

N/A

2.4.5 Page Usage/Data Volume Impacts

No impact to this section.

2.4.6 Page Mapping

Update the State Program Number page mapping.

2.5 Foster Care Resource Detail Page

2.5.1 Overview

The Foster Care Resource Detail page shows information for the Foster Care Resource.

The Placement Types section lists all Types available for the selected Foster Care resource. This SCR will move the State Program Number (SPN) from the License Detail page to this page to align with changes made in C-IV. The page will track up to two SPN's (a non-ISFC and an ISFC) for each Placement Type for a resource. Only certain types will accept an ISFC SPN. SPN values will be conditionally required depending on the placement type.

'Foster Family Agency' will be added to the dropdown of Placement Types.

2.5.2 Foster Care Resource Detail Mockup

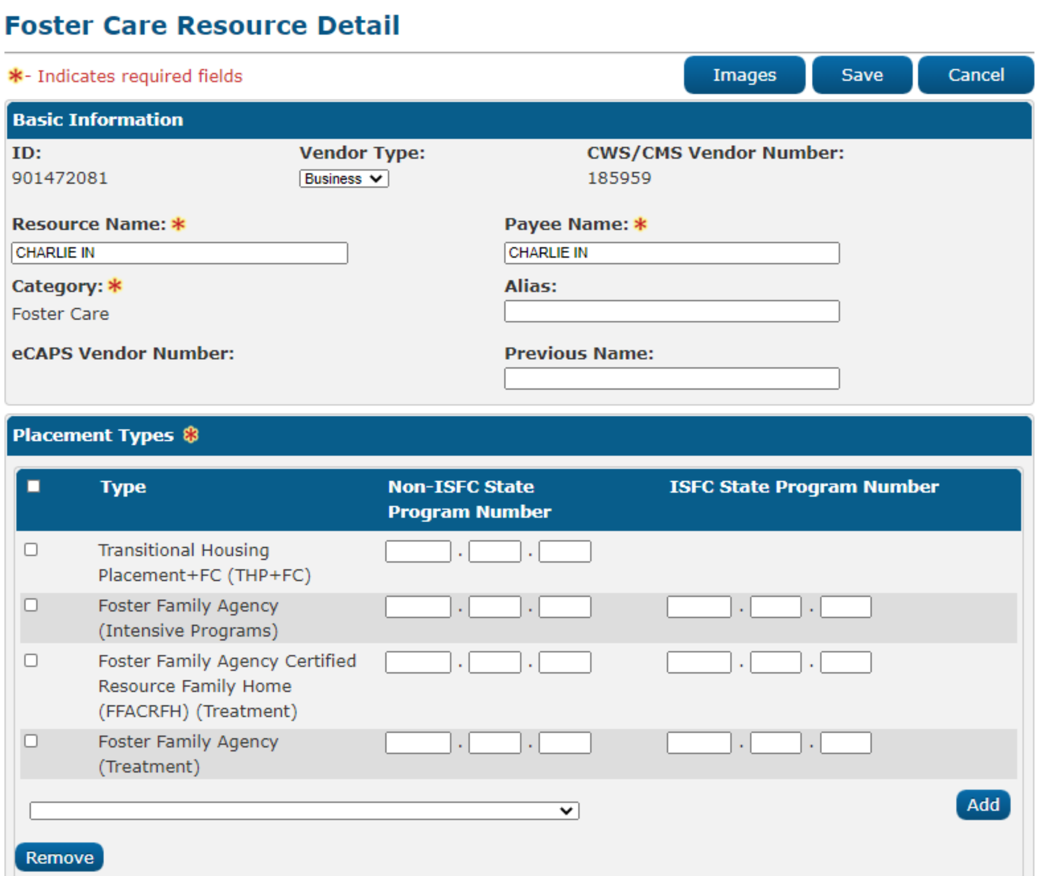


Figure 2.5.1 – Foster Care Resource Detail in Edit Mode

Figure 2.5.2 – Foster Care Resource Detail in View Mode

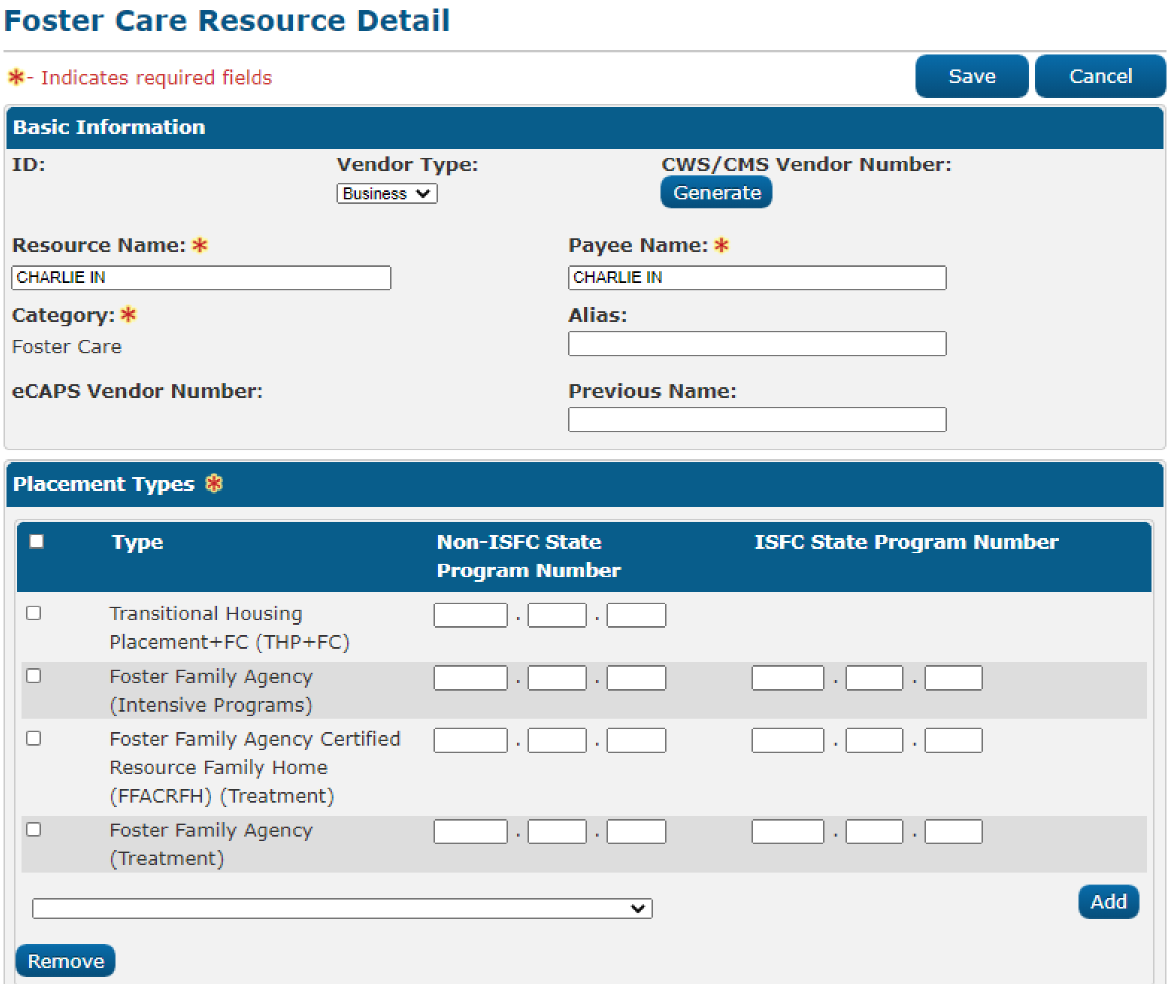


Figure 2.5.3 – Foster Care Resource Detail in Create Mode

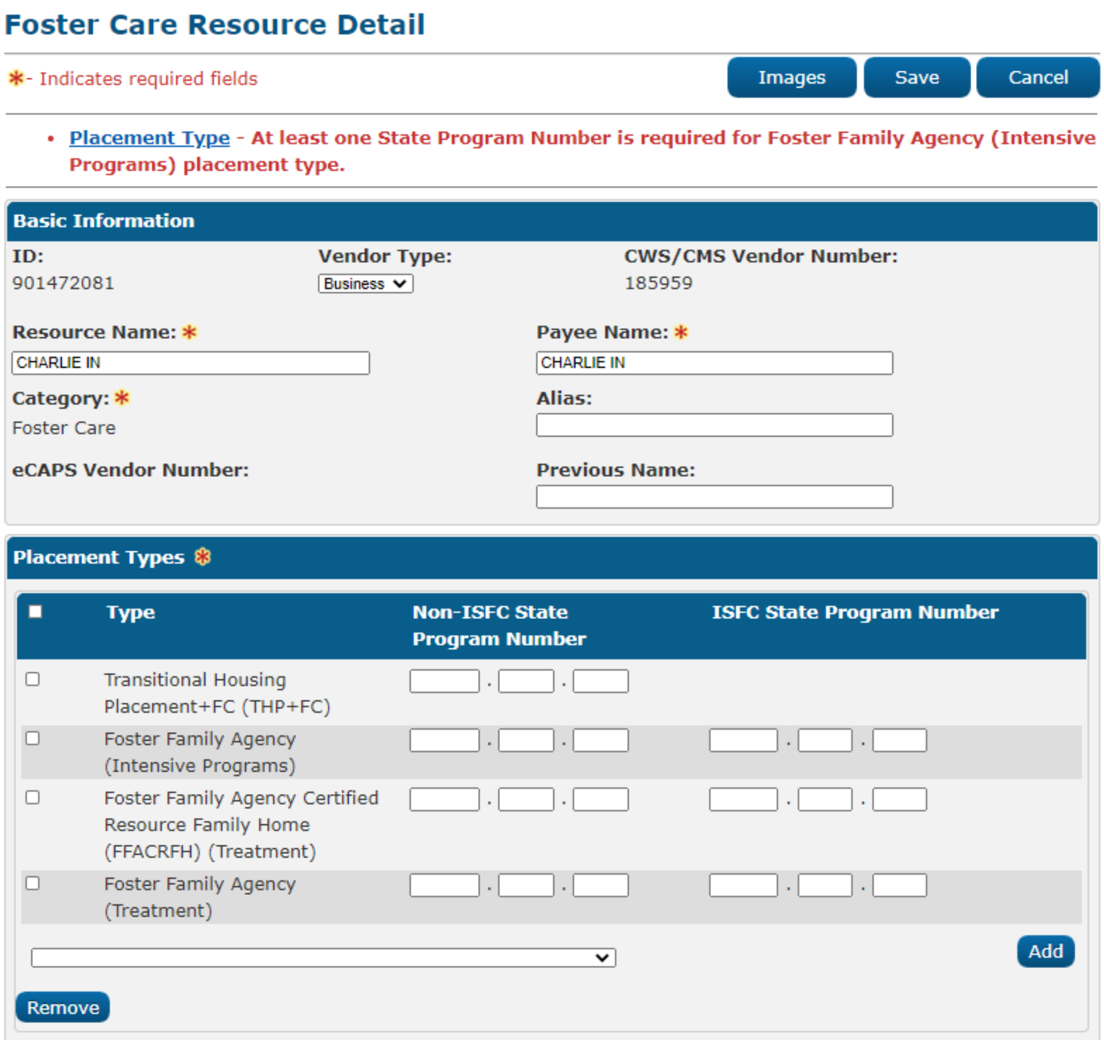


Figure 2.5.4 – Foster Care Resource Detail Placement Type Validation Message

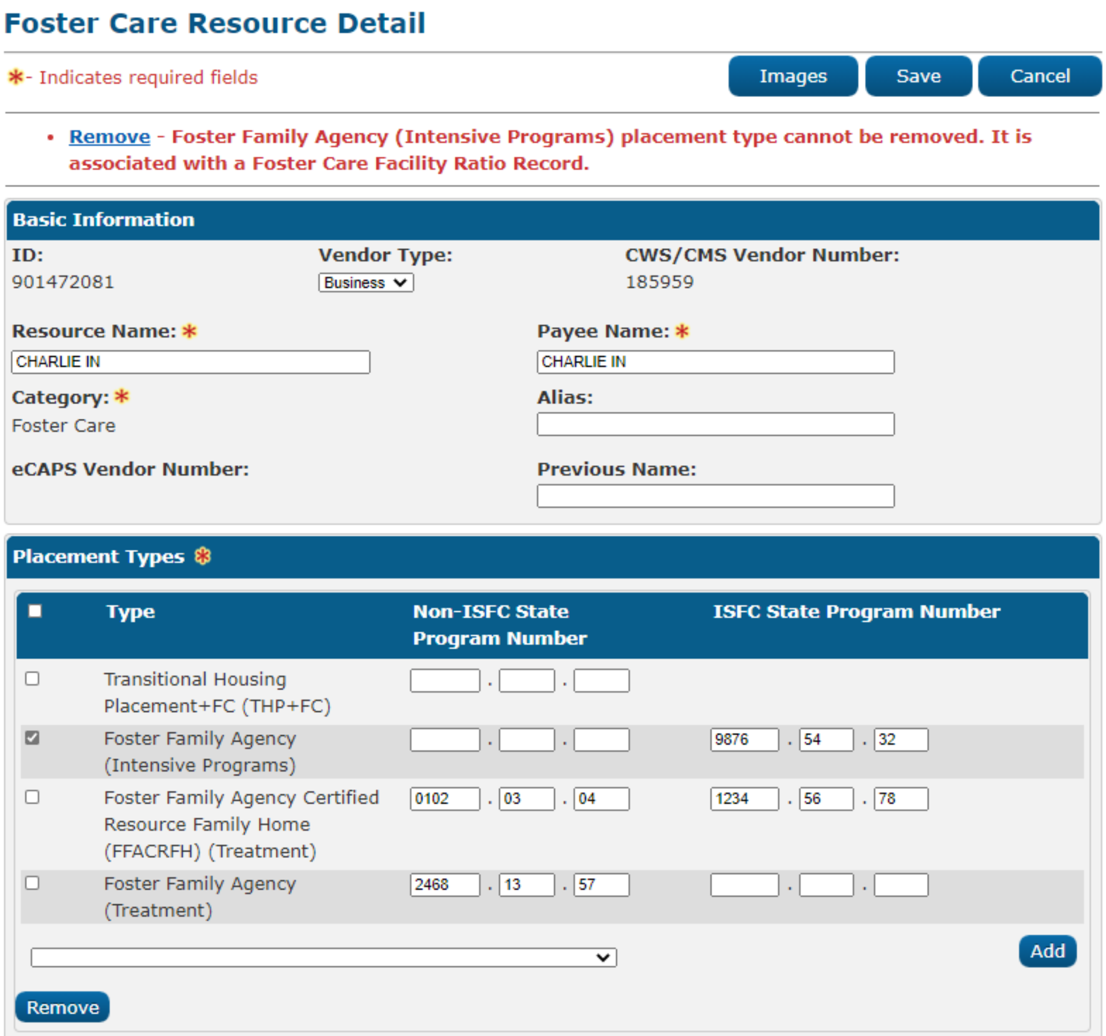


Figure 2.5.5 - Foster Care Resource Detail Remove Validation Message

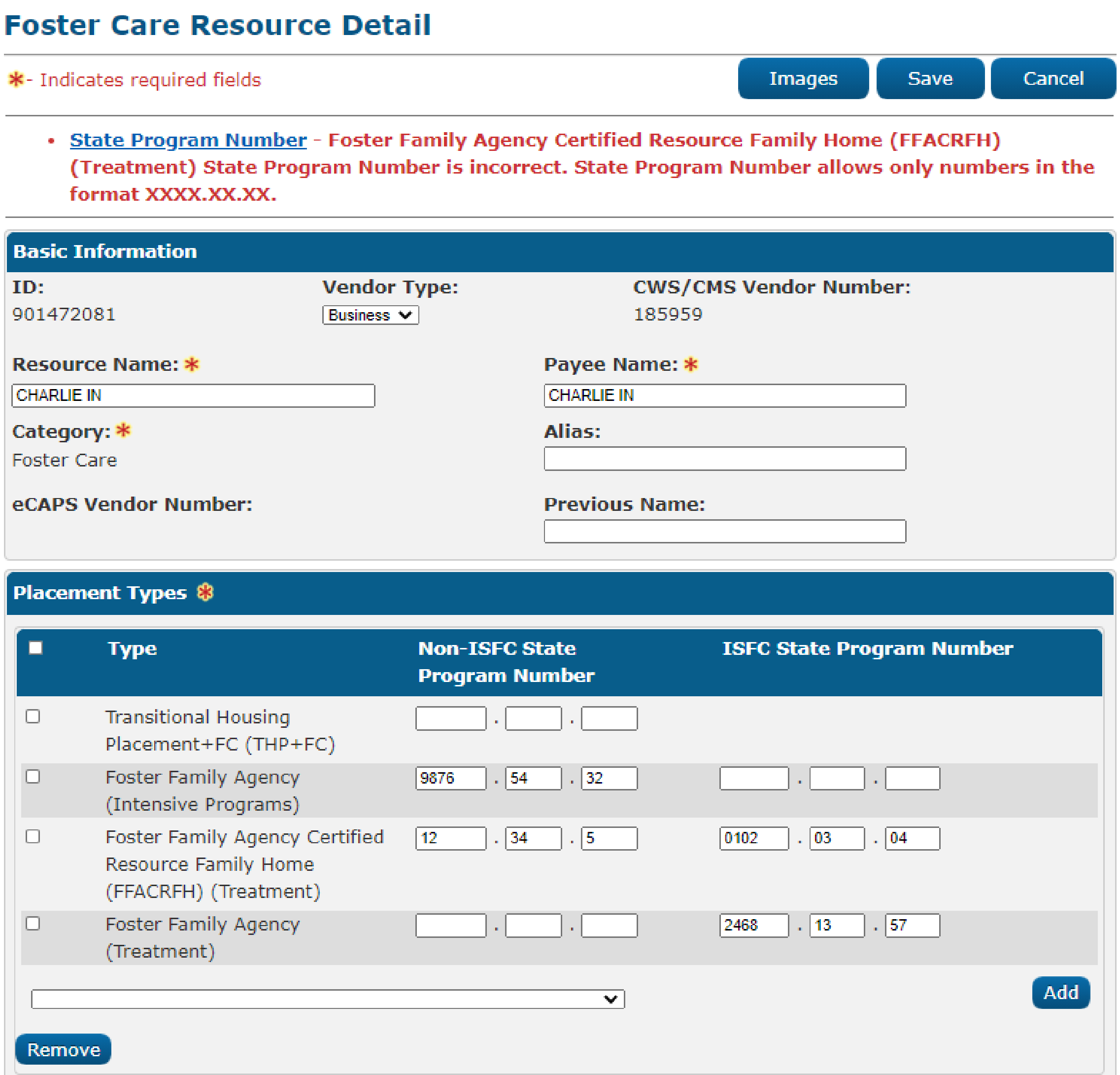


Figure 2.5.6 – Foster Care Resource Detail with State Program Number Format Validation Message

2.5.3 Description of Changes

1. Add the Non-ISFC State Program Number and ISFC State Program fields to the Placement Type table on the Foster Care Resource Detail page (Figures 2.5.1 and 2.5.2).
    a. The SPN field is formatted as shown above, i.e. "0000.00.00"
    b. When entering the SPN in Create or Edit mode, the cursor will automatically move to the next field once the current one has been filled.
    c. The SPN field under the ISFC State Program Number column will only display for the following placement types:
        i. Foster Family Agency
        ii. Foster Family Agency (Treatment)

iii. Foster Family Agency (Intensive Programs)
iv. Foster Family Agency (Non-Treatment)
v. Multidimensional
vi. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
vii. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)

2. Add 'Foster Family Agency' as a dropdown option in the placement type dropdown.
3. When a user attempts to add a placement type that requires a SPN without entering at least one SPN of either type, display a validation message:

   "**[Placement Type] – At least one State Program Number is required for [placement] placement type.**" (Figure 2.5.4).

   The list of types that require a SPN is in Appendix: Placement Types That Require a State Program Number.

4. When a user attempts to remove a placement type associated with a Foster Care Facility Ratio Record, display a validation message:

   "**Remove – [Placement Type] placement type cannot be removed. It is associated with a Foster Care Facility Ratio record.**" (Figure 2.5.5).

5. When a user attempts to save the Foster Care Resource Detail with an invalid State Program Number (i.e. the SPN does not follow the XXXX.XX.XX format), display a validation message:

   "**State Program Number – [Placement Type] State Program Number is incorrect. State Program Number allows only numbers in format XXXX.XX.XX.**" (Figure 2.5.6)

2.5.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: Foster Care Resource Detail**

2.5.5 Security Updates

N/A

2.5.6 Page Usage/Data Volume Impacts

No impact to this section.

2.5.7 Page Mapping

Update page mapping to include State Program Numbers.

2.6 Foster Care License Detail Page

2.6.1 Overview

The Foster Care License Detail page shows information related to a license held by the provider. This SCR will remove the SPN field from the page because it is moving to the Foster Care Resource Detail page.

2.6.2 Foster Care License Detail Mockup

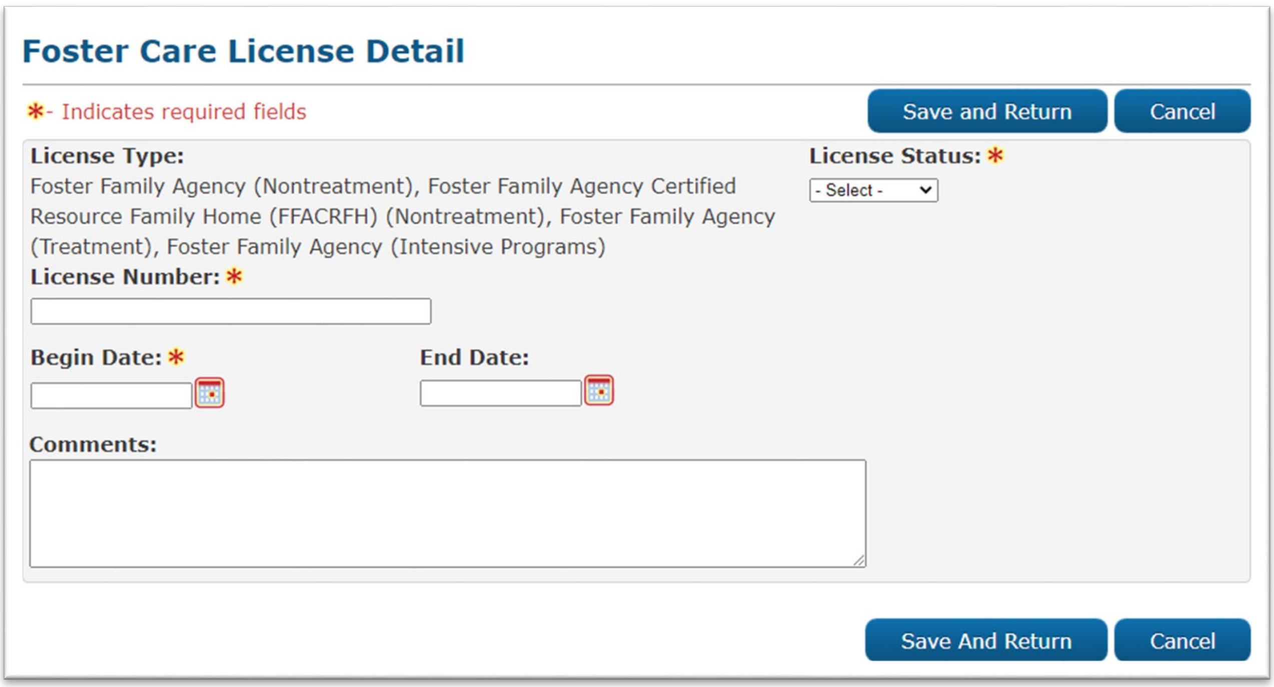


Figure 2.6.1 – Foster Care License Detail (Create Mode)

Figure 2.6.2 – Foster Care License Detail (Edit Mode)

Figure 2.6.3 – Foster Care License Detail (View Mode)

2.6.3 Description of Changes

1. Remove the State Program Number (SPN) field from the Foster Care License Detail page in all modes.

2.6.4 Page Location

- **Global: Resource Databank**
- **Local: Foster Care**
- **Task: License Information**

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Update page mapping to remove the State Program Number field.

2.6.7 Page Usage/Data Volume Impacts

No impact.

2.7 Foster Care Rate Detail Page

2.7.1 Overview

1. Allow rates with Begin Dates and End Dates up to one month in the future.
2. For the new Placement Type 'Foster Family Agency', update the Rate Detail page for FC to display the same dropdowns and options as 'Foster Family Agency (Nontreatment)' with one exception: do not show Standard State Rate in the Type dropdown since it is only used for pre-CCR age-based rates.
3. Add additional selections to the Rate dropdown for the placement type 'Out of State Basic'.

2.7.2 Foster Care Rate Detail Page Mockup

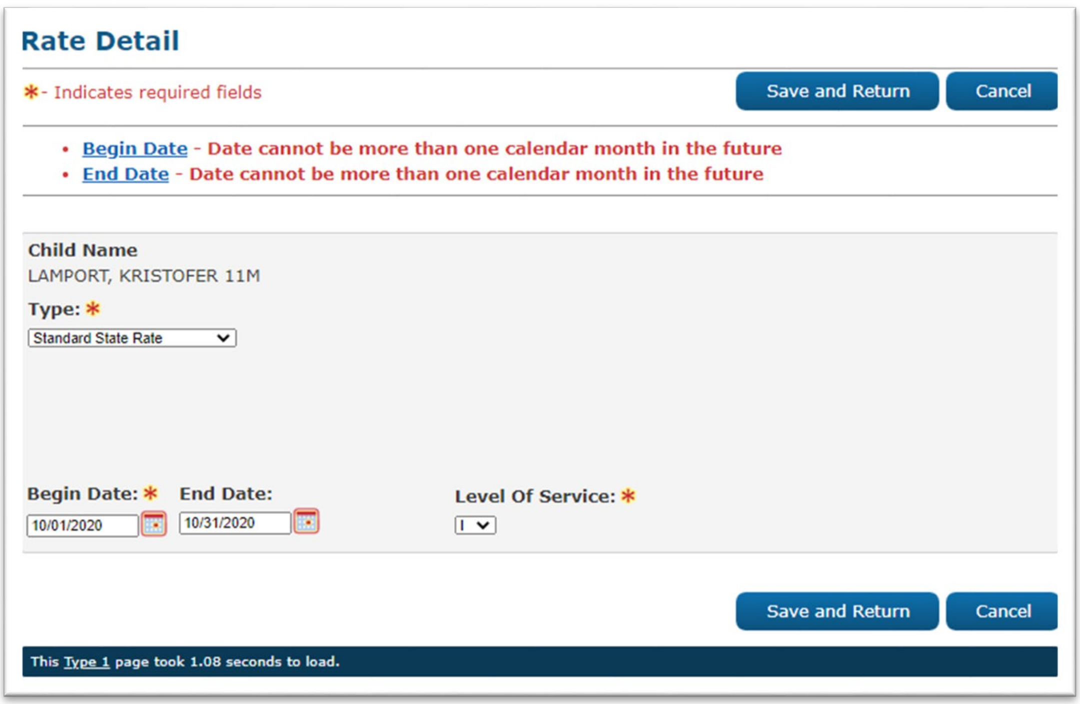


Figure 2.7.1 – FC Rate Detail Validation Message

2.7.3 Description of Changes

1. Modify the current logic on the FC Rate Detail page that prevents a worker from saving future dates for the Begin and End Date. Allow the worker to save a rate with a Begin Date or End Date no later than one calendar month in the future by making the following changes:

a. Remove the existing logic that prevents the user from saving the page with Begin and End Dates greater than the current date. This includes removing the following validations:

"**<u>Begin Date</u> – Date cannot be greater than current date**"

"**<u>End Date</u> – Date cannot be greater than current date**"

b. Display the following new validation message when user attempts to save a Begin Date that is later than one calendar month in the future (Figure 2.7.1):

"<u>Begin Date</u> – Date cannot be more than one calendar month in the future."

c. Display the following new validation message when user attempts to save an End Date that is later than one calendar month in the future (Figure 2.7.1):

"<u>End Date</u> – Date cannot be more than one calendar month in the future."

d. Update the date-picker next to the Begin Date and End Date fields to allow a user to select a date in the future.

2. LRS/CalSAWS is adding the new Placement Type 'Foster Family Agency' that already exists in C-IV. Update the Type, Basic Rate, and Level of Care fields on the FC Rate Detail page to display the same options for the new placement type 'Foster Family Agency' that display for the existing type 'Foster Family Agency (Nontreatment)' (excluding Standard State Rate).
   a. Type field:
      i. – Select –
      ii. Non Standard Rate
      iii. Regional Center Vendorized
      ~~iv. Standard State Rate~~
      iv. RB-FFA
      v. ISTF - ISFC - TFC
      vi. ISFA - ISFC – FFA

   b. When Type selection is ~~Standard,~~ ISTF - ISFC – TFC, or ISFA - ISFC – FFA, the 'Basic Rate' and 'Level of Care' fields are hidden.

   c. When Type is RB-FFA, the 'Basic Rate' field displays with <blank> and 'Level of Care' options and the field is required.

   d. When Basic Rate selection is 'Level of Care', the 'Level of Care' field displays with the dropdown options 'Basic Level Rate', 'LOC 2', 'LOC 3', and 'LOC 4' and the field is required.

(Note: For 'Non Standard Rate' or 'Regional Center Vendorized', a 'Rate' and 'Frequency' are required, and a 'Rate Location' can be added. For 'Non Standard Rate' a 'Non-Standard Sub-Type' dropdown also displays.)

3. When the placement type is 'Out of State Basic', the only selection that currently displays in the 'Type' field is 'Non Standard Rate'. Add the following additional values to the dropdown. No other dropdown options will display on the page when one of these values is selected:
    a. Standard State Rate
    b. Dual Agency RC-California Early Start Intervention
    c. Dual Agency RC-Lanterman Developmental Disability

2.7.4 Page Location

- **Global: Eligibility**
- **Local: Foster Care**
- **Task: Child Placement**

2.7.5 Page Usage/Data Volume Impacts

No impact to this section.

2.7.6 Page Mapping

No impact to this section.

2.8 Kin-GAP Rate Detail Page

2.8.1 Overview

Allow rates with Begin Dates and End Dates up to one month in the future.

2.8.2 Kin-GAP Rate Detail Mockup

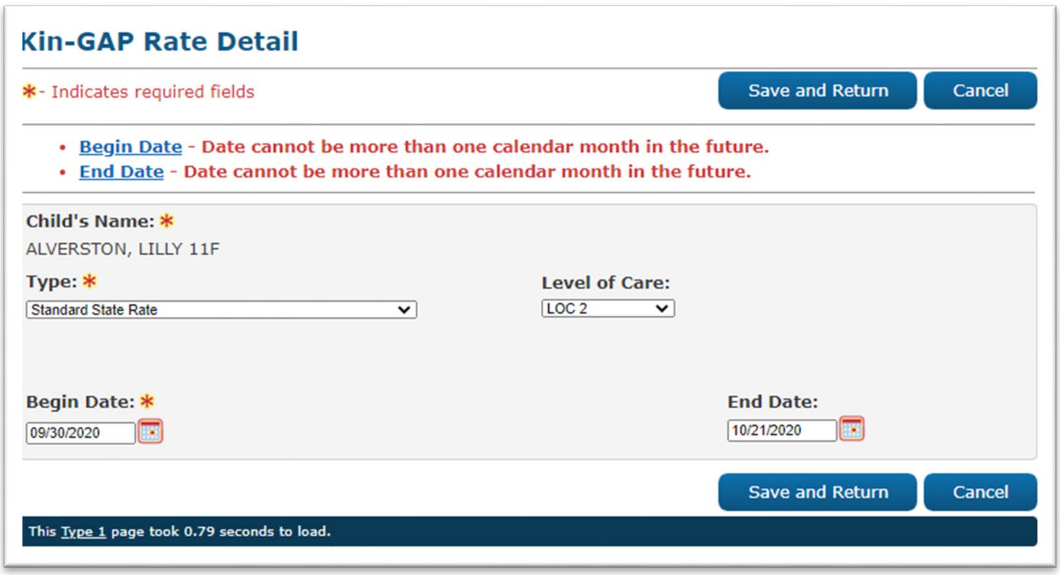


Figure 2.8.1 – Kin-GAP Rate Detail Validation Message

2.8.3 Description of Changes

1. Modify the current logic on the Kin-GAP Rate Detail page that prevents a worker from saving future dates for the Begin and End Date. Allow the worker to save a rate with a Begin Date or End Date no later than one calendar month in the future by making the following changes:

    a. Remove the existing logic that prevents the user from saving the page with Begin and End Dates greater than the current date. This includes removing the following validations:
        i. "**Begin Date – Date cannot be greater than current date**"
        ii. "**End Date – Date cannot be greater than current date**"

b. Display the following new validation message when user attempts to save a Begin Date that is later than one calendar month in the future (Figure 2.8.1):

"Begin Date – Date cannot be more than one calendar month in the future."

c. Display the following new validation message when user attempts to save an End Date that is later than one calendar month in the future (Figure 2.8.1):

"End Date – Date cannot be more than one calendar month in the future."

2.8.4 Page Location

- **Global: Eligibility**
- **Local: Kin-GAP**
- **Task: Rate Summary**

2.8.5 Page Usage/Data Volume Impacts

No impact to this section.

2.8.6 Page Mapping

No impact to this section.

2.9 Eligibility – Updates for New Placement Type: Foster Family Agency (FFA)

2.9.1 Overview

LRS/CalSAWS is adding the new Placement Type 'Foster Family Agency' that already exists in C-IV. This placement type will be mapped to the 'Foster Family Agency (Nontreatment)' placement type. ~~When Standard State Rate is selected, EDBC will pay the appropriate age-based FFA rate.~~ When RB-FFA rate (CCR Resource-based FFA rate) is selected, EDBC will pay the selected FFA LOC rate.

FC EDBC will be updated to allow SCI's to be paid to FFA placements, effective 3/1/2018.

2.9.2 Description of Changes

1. Update FC EDBC to pay the new Placement Type 'Foster Family Agency' the same as the existing LRS/CalSAWS placement type 'Foster Family Agency (Nontreatment)'.
2. Update FC EDBC to include FFA placements as a placement type that can be paid SCI's, effective 3/1/2018.

2.9.3 Programs Impacted

Foster Care

2.9.4 Performance Impacts

No impact.

2.10 Eligibility – Run EDBC Rate Validations for Non-Related Legal Guardianships

2.10.1 Overview

Certain rate selections should not be made for Non-Related Legal Guardianships. Two new soft validations are being added on the Run EDBC page for Foster Care programs. Note: these are soft validations to bring the data condition to the attention of the worker running EDBC. They will not prevent EDBC from running online or in batch if the conditions occur. (Note: C-IV had hard validations for these that prevented EDBC from running.)

2.10.2 Description of Changes

1. Add a new soft validation for the Foster Care program on the Run EDBC page. If these four conditions are all true:

    a. Benefit month is 12/2017 or later.
    b. Placement Authority is 'Non-Related Legal Guardianship' for any part of the benefit month.
    c. The field 'Which court established guardianship?' on the Placement Authority is 'Probate'. (PLACEMT_AUTH.COURT_GRDNSHP_TYPE_CODE Code 'PB')
    d. The Rate Detail for any Child Placement overlapping the above Placement Authority for the benefit month has:
        - 'Type' field is:
            - 'ISCO - ISFC – County', or
            - 'ISFA - ISFC – FFA', or
            - 'ISFO - ISFC - Family-Only', or
            - 'ISTF - ISFC – TFC', or
        - 'Level of Care' field is:
            - 'LOC 2', 'LOC 3', or 'LOC 4'

    display the following message:

    Foster Care: Non-Related Legal Guardianship established by Probate court should not have ISCO, ISFA, ISFO, or ISTF rates, or a Level of Care other than Basic Level Rate.

2. Add a new soft validation for the Foster Care program on the Run EDBC page. If these four conditions are all true:

    a. Benefit month is 12/2017 or later
    b. Placement Authority is 'Non-Related Legal Guardianship' for any part of the benefit month

c. The field 'Which court established guardianship?' on the Placement Authority says 'Juvenile.' (PLACEMT_AUTH.COURT_GRDNSHP_TYPE_CODE Code 'JV')
d. The Rate Detail for any Child Placement overlapping the above Placement Authority for the benefit month has:
   - 'Type' field is:
     - 'ISCO - ISFC – County', or
     - 'ISFA - ISFC – FFA', or
     - 'ISFO - ISFC - Family-Only', or
     - 'ISTF - ISFC – TFC'.

display the following message:

Foster Care: Non-Related Legal Guardianship established by Juvenile court should not have ISCO, ISFA, ISFO, or ISTF rates.

2.10.3 Programs Impacted

Foster Care

2.10.4 Performance Impacts

Impact is negligible.

2.11 Eligibility – Run EDBC Validation for ISFC Rates

2.11.1 Overview

ISFC rates should only be paid to placement resources that are authorized to receive them. A soft validation will be added to FC EDBC in LRS/CalSAWS to warn workers if an ISFC rate was selected for the benefit month but the State Program Number for the resource does not indicate that the resource should be paid an ISFC rate. The validation will not display if the SPN is the placeholder value '0000.00.00'.

2.11.2 Description of Changes

1. Add a new soft validation for the Foster Care program on the Run EDBC page. If these three conditions are all true:

    a. The benefit month is 12/2017 (implementation of CCR) or later.
    b. The Child Placement applicable to the benefit month has any of the following placement rates for any part of the benefit month:

Rate Type	Code Table	Code Value
ISFA - ISFC - FFA	503	FA
ISFO - ISFC - Family-Only	503	FO
ISCO - ISFC - County	503	IC
ISTF - ISFC - TFC	503	TF

    c. The resource where the child is placed does not have a State Program Number that matches the Placement Type on the Child Placement Detail where the State Program Number Type is "ISFC" and <u>both of the following are true</u>:
        i. the two-digit component in the middle of the State Program Number (ORG_STATE_PGM_NUM.STATE_PGM_NUM_IDENTIF_2) is "15".
        ii. The State Program Number is not 0000.00.00

    display the following message:

    Foster Care: [Placement name] has an ISFC rate but does not have a valid ISFC State Program Number.

2.11.3 Programs Impacted

Foster Care

2.11.4 Performance Impacts

Impact is negligible.

2.12 Batch/Interface – DCFS FC Inbound Reader Interface

2.12.1 Overview

Update the DCFS FC Inbound Reader Interface to support CCR policy changes.

2.12.2 Description of Change

Modify Batch Job PI19C884 with the following changes:

- The existing references to 'STATE_PGM_NUM_IDENTIF_1', 'STATE_PGM_NUM_IDENTIF_2', 'STATE_PGM_NUM_IDENTIF_3' on the 'LIC' table will be removed from the Inbound Reader job because those fields are being dropped from the LIC table.
- If any data is received in the inbound interface data for the State Program Number, it will not be updated in LRS/CalSAWS.
- If a new resource is being created or updated for one of the placement types that requires a State Program Number, insert a record in the new ORG_STATE_PGM_NUM table being added with this SCR. Populate the following fields as shown:
    'STATE_PGM_NUM_IDENTIF_1' = "0000"
    'STATE_PGM_NUM_IDENTIF_2' = "00"
    'STATE_PGM_NUM_IDENTIF_3' = "00"
    'Type' = 'Non-ISFC'

  The list of placement types that require an SPN is in Appendix: Placement Types That Require a State Program Number.

2.12.3 Execution Frequency

No Change

2.12.4 Key Scheduling Dependencies

No Change

2.12.5 Counties Impacted

No Change

2.12.6 Data Volume/Performance

N/A

2.12.7 Failure Procedure/Operational Instructions

No Change

2.13 Fiscal - Auditor Controller Writer (POXXF108)

2.13.1 Overview

Update the Auditor Controller Writer to populate State Program Number from the Foster Care Resource Detail page (See section 2.5).

2.13.2 Description of Change

Update the Auditor Controller Writer job to populate State Program Number from the new data table for the unclaimed issuances.

For issuances created by EDBC, the SPN will be based on the Foster Care rate structure code (CCR, Non-CCR or ISFC) of the EDBC_PERS_MISC and the placement type. The system will use Non-ISFC SPN for CCR and Non-CCR and will use ISFC SPN for ISCF.

For Non-EDBC issuances, the SPN will be based on the placement type from the Child Placement record and will be Non-ISFC. System will use the latest record when there are multiple Child Placements available for the benefit month of the issuance.

2.13.3 Execution Frequency

No Changes.

2.13.4 Key Scheduling Dependencies

No Changes.

2.13.5 Counties Impacted

CIV migration counties only.

2.13.6 Data Volume/Performance

N/A

2.13.7 Failure Procedure/Operational Instructions

No changes

2.14 Fiscal - Migration Warrant Print Writer (POXX100, POXXF101, POXXF102)

2.14.1 Overview

Update the Migration Warrant Print Writer to populate State Program Number from the Foster Care Resource Detail page (See section 2.3).

2.14.2 Description of Change

Update the Migration Warrant Print Writer to populate State Program Number from the new data table for issuances.

For issuances created by EDBC, the SPN will be based on the Foster Care rate structure code (CCR, Non-CCR or ISFC) of the EDBC_PERS_MISC and the placement type. The system will use Non-ISFC SPN for CCR and Non-CCR and will use ISFC SPN for ISCF.

For Non-EDBC issuances, the SPN will be based on the placement type from the Child Placement record and will be Non-ISFC. System will use the latest record when there are multiple Child Placements available for the benefit month of the issuance.

2.14.3 Execution Frequency

No Changes.

2.14.4 Key Scheduling Dependencies

No Changes.

2.14.5 Counties Impacted

CIV migration counties only.

2.14.6 Data Volume/Performance

N/A

2.14.7 Failure Procedure/Operational Instructions

No changes

2.15 Fiscal - Foster Care Benefit Issuance Claiming (PBXXF202)

2.15.1 Overview

Update the Foster Care Benefit Issuance Claiming batch to populate State Program Number from the Foster Care Resource Detail page (See section 2.3).

2.15.2 Description of Change

Update the following modules to populate State Program Number from the new table based on the Foster Care rate structure code and the placement type.

- AA/KG Benefit Issuance Claiming Module
- AA/KG Benefit Issuance Adjustment Claiming Module
- FC Benefit Issuance Claiming Module
- FC Benefit Issuance Adjustment Claiming Module

Update the following modules to populate Non-ISFC State Program Number from the new table based on the placement type for the issuance. System will use the latest record when there are multiple Child Placements available for the benefit month of the issuance.

- FC Payment Request Issuance Claiming Module
- FC Payment Request Issuance Adjustment Claiming Module
- FC Payment Request Issuance Pay Code Adjustment Claiming Module

2.15.3 Execution Frequency

No changes

2.15.4 Key Scheduling Dependencies

No changes

2.15.5 Counties Impacted

All Counties.

2.15.6 Data Volume/Performance

N/A

2.15.7 Failure Procedure/Operational Instructions

No changes

2.16 Fiscal - Recovery Account Claiming (PBXXR203)

2.16.1 Overview

Update the Recovery Account Claiming batch to determine the State Program Number of the Foster Care Vendors. This is a code-maintenance update and does not change any batch functionalities.

2.16.2 Description of Change

Update the Cross-Program Adjustment Module to read State Program Number from the new table based on the Foster Care rate structure code of the EDBC_PERS_MISC and the placement type when processing transactions due to cross program adjustments.

2.16.3 Execution Frequency

No changes

2.16.4 Key Scheduling Dependencies

No changes

2.16.5 Counties Impacted

All Counties

2.16.6 Data Volume/Performance

The Cross Program Adjustment Batch has not processed any records and should be disabled since we do not have cross program adjustments in the system. This update is only to make sure batch will not break during execution. Fiscal committee will decide whether to disable this module in the future.

2.16.7 Failure Procedure/Operational Instructions

No changes

2.17 Client Correspondence – Updates FC/KG CCR Approval NOA Template

2.17.1 Overview

Update the FC/KG Approval NOA to support three additional dynamic sections: Approval for Income Change, Infant Supplement, and Supplemental Care Increment. These three reasons are currently triggered for Change and Supplement NOAs and will be updated to trigger for the Approval NOA as well.

State Form/NOA: FC: NA 403 (4/17); KG: NA 403A (4/17)

Existing Template Revision Date: 4/17

Current Program(s): FC, KG

Include NA Back 9: Y

Existing Languages:

English

2.17.2 Add Section Generation for Countable Income, Infant Supplement Issued, and Supplemental Care Increment

The following fragments will be added to the FC/KG CCR Approval NOA as dynamic fragments, to generate under the following conditions:

Section	Generation Conditions
Income Change **Verbiage:** "The Child has Countable Income" **Associated Action Fragment:** FC_KG_AP_ACTION4_EN ID #: 4110	• Program is FC or KG • Action Type is Approval • Current EDBC has a CCR or ISFC rate structure • The Child has Countable Earned or Unearned Income in the Foster Care Budget

Section	Generation Conditions
Infant Supplement Issued **Verbiage:** "Your case had been issued an Infant Supplement Payment." **Associated Action Fragment:** FC_KG_AP_ACTION4_EN ID #: 4110	• Program is FC or KG • Action Type is Approval • Current EDBC has a CCR or ISFC rate structure • The newly saved EDBC has an Infant Supplement Amount in the Foster Care Budget
Special Care Increment **Verbiage:** "Your case has been issued a Special Care Increment" * *Current fragment verbiage reads "Supplemental Care Increment". This will be updated to read "Special Care Increment" **Associated Action Fragment:** FC_KG_AP_ACTION4_EN ID #: 4110	• Program is FC or KG • Action Type is Approval • Current EDBC has a CCR or ISFC Rate Structure • The newly saved EDBC has a Special Care Increment amount in the Foster Care Budget

2.17.3 Regression Test to ensure continued generation for Change and Supplement Action Types

2.18 Client Correspondence – Update FC/KG Approval Action Fragments

2.18.1 Overview

C-IV populates the FC/KG Approval Action Fragment with an additional piece of information – Aid Type. This update will add this variable on the Action Fragment, placing it in a separate column to the right of the Person variable, in order to better match the C-IV and State versions.

Action Fragment Name and ID:

FC_KG_AP_ACTION4

ID # = 4110

State Form/NOA: FC: NA 403 (4/17); KG: NA 403A (4/17)

Current Program(s): FC, KG

Current Action Type: AP

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

English

2.18.2 Update Fragment XDP

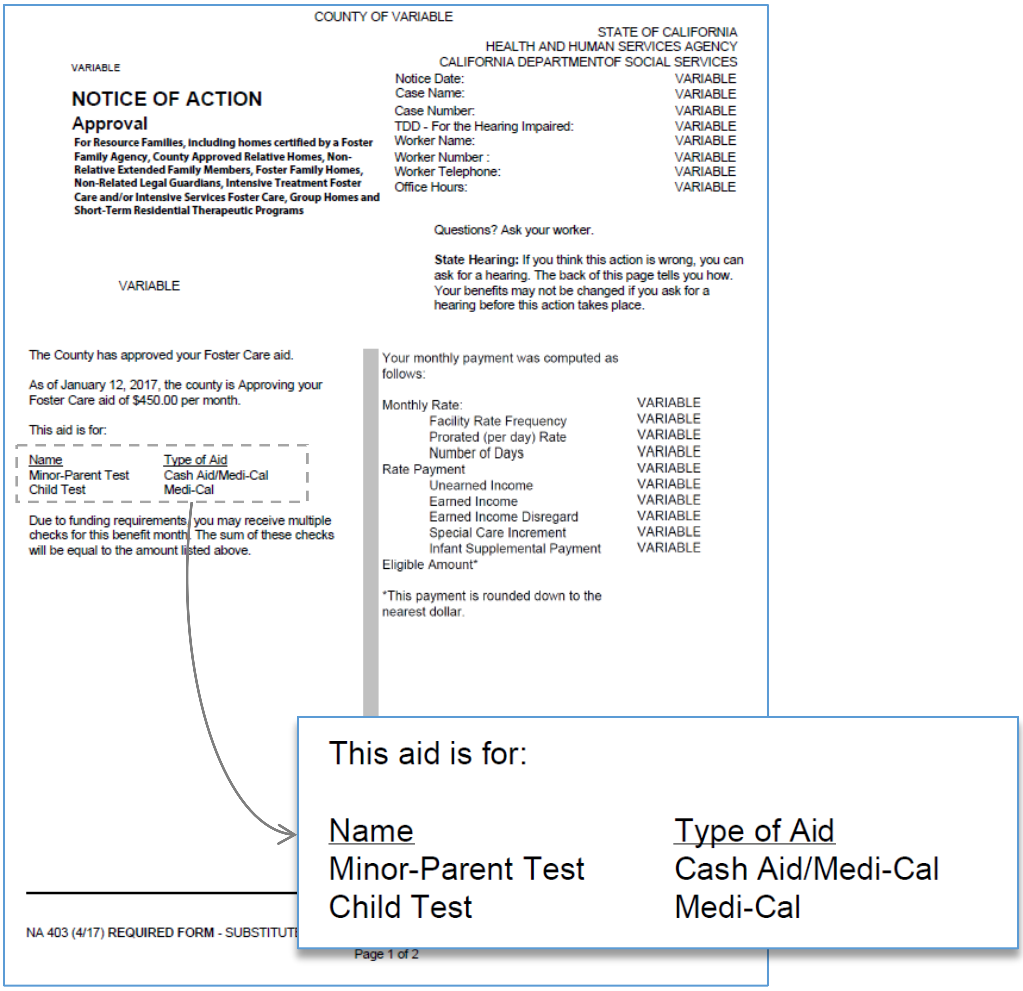
XDP will be updated with an additional column to the right of 'Person'(s) that will populate with the Aid Type – either Medi-Cal or Cash Aid/Medi-Cal

Updated Languages:

English

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	This aid is for: <Person 1> <Person 2> …	This aid is for: Name: Type of Aid: <Person 1> <Aid Type 1> <Person 2> <Aid Type 2> …	Arial, Size 10


COUNTY OF VARIABLE

STATE OF CALIFORNIA
HEALTH AND HUMAN SERVICES AGENCY
CALIFORNIA DEPARTMENTOF SOCIAL SERVICES

VARIABLE

NOTICE OF ACTION
Approval
For Resource Families, including homes certified by a Foster Family Agency, County Approved Relative Homes, Non-Relative Extended Family Members, Foster Family Homes, Non-Related Legal Guardians, Intensive Treatment Foster Care and/or Intensive Services Foster Care, Group Homes and Short-Term Residential Therapeutic Programs

Notice Date:	VARIABLE
Case Name:	VARIABLE
Case Number:	VARIABLE
TDD - For the Hearing Impaired:	VARIABLE
Worker Name:	VARIABLE
Worker Number :	VARIABLE
Worker Telephone:	VARIABLE
Office Hours:	VARIABLE

Questions? Ask your worker.

State Hearing: If you think this action is wrong, you can ask for a hearing. The back of this page tells you how. Your benefits may not be changed if you ask for a hearing before this action takes place.

VARIABLE

The County has approved your Foster Care aid.

As of January 12, 2017, the county is Approving your Foster Care aid of $450.00 per month.

This aid is for:

Name	Type of Aid
Minor-Parent Test	Cash Aid/Medi-Cal
Child Test	Medi-Cal

Due to funding requirements, you may receive multiple checks for this benefit month. The sum of these checks will be equal to the amount listed above.

Your monthly payment was computed as follows:

Monthly Rate:	VARIABLE
Facility Rate Frequency	VARIABLE
Prorated (per day) Rate	VARIABLE
Number of Days	VARIABLE
Rate Payment	VARIABLE
Unearned Income	VARIABLE
Earned Income	VARIABLE
Earned Income Disregard	VARIABLE
Special Care Increment	VARIABLE
Infant Supplemental Payment	VARIABLE
Eligible Amount*	

*This payment is rounded down to the nearest dollar.

This aid is for:

Name	Type of Aid
Minor-Parent Test	Cash Aid/Medi-Cal
Child Test	Medi-Cal

NA 403 (4/17) REQUIRED FORM - SUBSTITUTI

Page 1 of 2

2.18.3 Add/Update Fragment Variable Population

A new variable, positioned in a column to the right of the current Person variable, will populate with Aid Type.

Variable Name	Population	Formatting*
Aid Type	Populates with Aid Type – either "Medi-Cal" if the status is an active MMO, or "Cash Aid/Medi-Cal" if the status is active MEM.	Arial, Size 10

Variables Requiring Translations: N/A

2.19 Client Correspondence – Update FC/KG Change Action Fragment

2.19.1 Overview

The FC/KG Change Action Fragment will be updated to populate with the same Aid Type variable as the Approval Fragment.

Action Fragment Name and ID:

FC_KG_CH_ACTION3

ID # = 4111

State Form/NOA: FC: NA 403 (4/17); KG: NA 403A (4/17)

Current Program(s): FC, KG

Current Action Type: AP

Current Fragment Level: Program

Currently Repeatable: N

Existing Languages:

English

2.19.2 Update Fragment XDP

XDP will be updated with an additional column to the right of 'Person'(s) that will populate with the Aid Type – either Medi-Cal or Cash Aid/Medi-Cal

Updated Languages:

English

NOA Mockups/Examples: See Supporting Documents #1

Description	Existing Text	Updated Text	Formatting*
Static	This aid is for: <Person 1> <Person 2> ...	This aid is for: Name: Type of Aid: <Person 1> <Aid Type 1> <Person 2> <Aid Type 2> ...	Arial, Size 10

2.19.3 Add/Update Fragment Variable Population

A new variable, positioned in a column to the right of the current Person variable, will populate with Aid Type.

Variable Name	Population	Formatting*
Aid Type	Populates with Aid Type – either "Medi-Cal" if the status is an active MMO, or "Cash Aid/Medi-Cal" if the status is active MEM.	Arial, Size 10

Variables Requiring Translations: N/A

2.20 Client Correspondence – Update FC/KG SCI Change Fragment Verbiage

2.20.1 Overview

Update the verbiage used in Supplemental Care Increment Issued XDP to match the verbiage used by C-IV, and by the existing Foster Care Budget page and NOA snippet in LRS/CalSAWS.

Action Fragment Name and ID:

Foster Care

FC_CH_ SUPPLEMENTAL_CARE_INCREMENT_T311

ID # = 7487

Kin-GAP

KG_CH_SUPPLEMENTAL_CARE_INCREMENT_K020

ID # = 7492

State Form/NOA: FC – NA 403 (4/17); KG – NA 403A (4/17)

Current Program(s): FC, KG

Current Action Type: Change, Supplement

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English

2.20.2 Update Fragment XDP

Update Fragment text to replace "Supplemental" with "Special" to match C-IV verbiage, and the Foster Care Budget that appears on the NOA in LRS/CalSAWS.

Updated Languages: English

Description	Existing Text	Updated Text	Formatting*
Static	Your case has been issued a Supplemental Care Increment.	Your case has been issued a Special Care Increment.	Arial, Size 10

2.21 Client Correspondence – Turn off KG Age Rules Discontinuance Reason

2.21.1 Overview

For KG, currently the Age Rules NOA generates when the discontinuance reason is 'Guardianship Ended' which is incorrect. This change will turn off that NOA.

Turn off NOA generation in LRS/CalSAWS for:

Reason Fragment Name and ID:

KG_TN_NO_LONGER_SUPPORT_K015

ID #: 7502

"You are no longer providing support for {Person}. He/She no longer meets the Age Rules"

State Form/NOA: NA 403A (4/17)

Current Program(s): KG

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English

2.22 Client Correspondence – Update KG Legal Guardianship Terminated Discontinuance Reason

2.22.1 Overview

Currently in LRS/CalSAWS, the Legal Guardianship fragment is generated only when the Child is under 18 and the reason is <u>*not*</u> 'Guardianship Ended', which is incorrect. This change will update the generation conditions for the Legal Guardianship Discontinuance NOA. It will now fire when the reason <u>*is*</u> 'Guardianship Ended'.

Action Fragment Name and ID:

KG_TN_LEGAL_GUARD_TERM_K014

ID # = 7501

"The Legal Guardianship was Terminated"

State Form/NOA: NA 403A (4/17)

Current Program(s): KG

Current Action Type: Discontinuance

Current Fragment Level: Program

Currently Repeatable: N

Include NA Back 9: Y

Current Forms/NOAs Generated with this NOA: N/A

Existing Languages:

English

2.22.2 Updates to Fragment Generation

Update the Generation Conditions for the Legal Guardianship Terminated Reason Fragment to generate when:

- Program is Kin-GAP
- Action Type is Discontinuance
- Prior EDBC has the CCR or ISFC Rate Structure
- EDBC Fails for reason 'Guardianship Ended' (CT73_84_GUARDIANSHIP_ENDED) *(Note: this last bullet is the only change to the existing logic)*

New NOA Template: N

New Program Generation: N

New Action Type: N

Update to Fragment Level: N

Repeatable: N

New Forms/NOAs Generated with this NOA: N/A

Action Fragment: FC_KG_TN_ACTN4

Message Fragment: N/A

Ordering on NOA: This fragment will generate immediately following the Discontinuance Action Fragment

2.23 Data Change – Delete LRS FC Ratio data from Conversion

2.23.1 Overview

FC Ratio and FC Age Ratio data was loaded into LRS/CalSAWS database tables in 2016 during the conversion process. The data in those tables was not able to be viewed or updated through the LRS/CalSAWS application. It will be deleted prior to the FC Ratio page changes in this SCR being implemented.

2.23.2 Description of Change

1. Delete all existing FC Ratio and FC Age Ratio data stored in the LRS/CalSAWS database in the FC_RATIO and FC_AGE_RATIO tables.

2.23.3 Estimated Number of Records Impacted/Performance

Approximately 6,000 records will be deleted.

2.24 Data Change – Set Initial State Program Number Values for existing Resources in LRS/CalSAWS where required.

2.24.1 Overview

Per a request from DDID 2096, a State Program Number is required for certain Placement Types. This SCR is updating the State Program Number field and implementing the logic that will make it required for some placement types.

A data change will insert an initial placeholder value for existing resources in LRS/CalSAWS with one of those required types.

2.24.2 Description of Change

Insert a State Program Number with Type 'Non-ISFC' and value '0000.00.00' for all placement types on existing LRS/CalSAWS Foster Care resources that are listed in the Appendix: Placement Types That Require a State Program Number.

2.24.3 Estimated Number of Records Impacted/Performance

Approximately 1,800 records will be updated.

2.25 Automated Regression Test

2.25.1 Overview

Create new automated scripts to verify the data entry and a subset of the validation messages on the following pages:

1. Foster Care Facility Ratio List
2. Foster Care Facility Ratio Detail
3. Foster Care Resource Detail
4. Foster Care Rate Detail
5. Kin-GAP Rate Detail

Note: Page validations will only be verified in a single page mode (Create or Edit).

2.25.2 Description of Change

1. Create new automated scripts to verify the following on the Foster Care Facility Ratio List page:
    a. The 'No data found.' message displays when no detail records exist for the resource in context.
    b. The table data populates as expected for saved detail records.
    c. Clicking the Remove button refreshes the page with the selected records (and only the selected records) no longer displayed.
2. Create new automated scripts to verify that new records can be created and saved through the Foster Care Facility Ratio Detail page, and to verify the following on this page:
    a. Page version updates when the Placement Type or Ratio Type values are changed.
    b. Editable field availability and content based on the Placement Type, and Ratio Type where appropriate:
        i. Single Ratio page version when each of the following Placement Types is selected:
            1. Group Home
            2. Out of State Group Home
            3. Short Term Therapeutic Residential Program
            4. Transitional Housing Placement + FC (THP+FC)
            5. Transitional Housing Placement Program (THPP)
        ii. CCR page version when each of the following Placement Types is selected:
            1. Foster Family Agency
            2. Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
            3. Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)

iii. CCR page version when each of the following Placement Types is selected, and the Ratio Type 'CCR' is selected:
    1. Foster Family Agency (Intensive Programs)
    2. Foster Family Agency (Nontreatment)
    3. Foster Family Agency (Treatment)
    4. Multidimensional

iv. Non-CCR page version when each of the following Placement Types is selected:
    1. Adoptive Homes
    2. Community Treatment Facility
    3. Foster Family Home
    4. Foster Family Home-Shelter Care
    5. Legal Guardian
    6. Relative Home

v. Non-CCR page version when each of the following Placement Types is selected, and the Ratio Type 'Non-CCR' is selected:
    1. Foster Family Agency (Intensive Programs)
    2. Foster Family Agency (Nontreatment)
    3. Foster Family Agency (Treatment)
    4. Multidimensional

c. The Effective Dating Confirmation List page displays when attempting to save a new record or change to an existing record such that the Begin Date and End Date range would overlap another existing record with the same Rate Type, Ratio Type, and Placement Type.

d. The following validation messages display in at least one applicable scenario:
    i. **"<u>[Field Name]</u> - Input [value] is not valid for this field."**
    ii. **"<u>Administrative Federal</u> - Administrative Federal and Administrative Non-Federal Ratios not equal to 100 for [Age-Based Ratio / CCR Rate]"**
    iii. **"<u>End Date</u> - End Date must be after Begin Date"**
    iv. **"<u>Maintenance Federal</u> - Maintenance Federal and Maintenance Non-Federal Ratios not equal to 100 for [Age-Based Ratio / CCR Rate]"**
    v. **"<u>Maintenance Non-Federal</u> - Maintenance Non-Federal Ratio must be less than or equal to 100"**
    vi. **"<u>Maintenance Ratio</u> - Maintenance Ratio and Administration Ratios are not equal to 100 for [Age-Based Ratio / CCR Rate]"**

    Note: Each message will be verified at least once across all Placement Type and Ratio Type combinations, and at least one applicable field / section. These messages will not be verified for each individual combination or field / section.

3. Create new, or update existing automated scripts to verify that new records can be created and saved through the Foster Care Resource Detail page, and to verify the following on this page:
    a. Multiple Placement Types can be added for the same resource.
    b. The following value is available in the Placement Type dropdown:
        i. Foster Family Agency
    c. The following validation messages display in at least one applicable scenario:
        i. **"<u>[Placement Type]</u> - At least one State Program Number is required for [Placement Type] placement type."**
        ii. **"<u>Remove</u> - [Placement Type] placement type cannot be removed. It is associated with a Foster Care Facility Ratio Record."**
        iii. **"<u>State Program Number</u> - [Placement Type] State Program Number is incorrect. State Program Number allows only numbers in the format XXXX.XX.XX."**

        Note: This validation message will be verified for both ISFC and Non-ISFC fields.
4. Create new, or update existing automated scripts to verify that new records can be created and saved through the Foster Care Rate Detail page, and to verify the following on this page:
    a. Records can be saved with Begin Date and End Date values one calendar month in the future.
    b. The following validation messages display in at least one applicable scenario:
        i. **"<u>Begin Date</u> - Date cannot be more than one calendar month in the future."**
        ii. **"<u>End Date</u> - Date cannot be more than one calendar month in the future."**
    c. When the Placement Type of 'Foster Family Agency' is selected, the following Type field values are available:
        i. Non Standard Rate
        ii. Regional Center Vendorized
        ~~iii. Standard State Rate~~
        iii. RB-FFA
        iv. ISTF - ISFC - TFC
        v. ISFA - ISFC - FFA
    d. When the Placement Type of 'Out of State Basic' is selected, the following Type field values are available:
        i. Dual Agency RC-California Early Start Intervention
        ii. Dual Agency RC-Lanterman Developmental Disability
        iii. Non Standard Rate
        iv. Standard State Rate
5. Create new, or update existing automated scripts to verify that new records can be created and saved through the Kin-GAP Rate Detail page, and to verify the following on this page:

a. Records can be saved with Begin Date and End Date values one calendar month in the future.
b. The following validation messages display in at least one applicable scenario:
   i. **"<u>Begin Date</u> - Date cannot be more than one calendar month in the future."**
   ii. **"<u>End Date</u> - Date cannot be more than one calendar month in the future."**

2.26 Client Correspondence - Regression Test SCI FFA NOAs

Conduct Regression Testing to ensure the generation of the following Special Care Increment (SCI) NOA fragments for the newly added FFA placement type:

Fragment ID #	Fragment Name
7486	FC_CH_SCI_T311
6156	FC_CH_AUTHORIZED_SPECIAL_CARE_RATE_T025
~~6162~~	~~FC_CH_TERMINATED_SPECIAL_CARE_RATE_T026*~~
6168	FC_CH_REDUCED_SPECIAL_CARE_RATE_T027
6181	FC_CH_AUTHORIZED_REGIONAL_CENTER_RATE_T028
7750	FC_CH_STOP_SCI_NON_CCR_T904
7751	FC_CH_STOP_SCI_PRORATION_NON_CCR_T905
7756	FC_CH_STOP_SCI_CCR_T906
7757	FC_CH_STOP_SCI_PRORATION_CCR_T907

*Fragment with ID 6162 is currently turned off in LRS and cannot be tested.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	CC	Mockup of a Change NOA with the FC/KG Change Action Fragment. This updated fragment contains a two-column section, with the Person's name, as well as Aid Type. This example is generated for Kin-GAP, but the same verbiage and logic is used for Foster Care. This addition will also be made for the FC/KG Approval Action Fragment.	FC/KG Change Fragment w/ Aid Type
2	Online	Online Security Matrix	CA-200366 Migration SCR for CC

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.10.4.26	The LRS shall make payments based on Vendor-specific and DCFS Programs Foster Care rates if those rates are indicated and available for a specified service. If the Vendor-specific rate is not available in the LRS, payment shall be defaulted to the general rate for the service provided.	Updates are being made to align CCR changes from C-IV and LRS/CalSAWS prior to migration to pay the correct FC and KG rates.
2.5.2.38	The LRS shall allow COUNTY-specified Users to collect DCFS Programs child placement information at the individual level.	Updates are being made to align CCR changes from C-IV and LRS/CalSAWS prior to migration to pay the correct FC and KG rates.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CA-200366	Online	**FC_RATIO** – adding PLACEMT_TYPE_CODE (values from Code Table 298) and RATIO_TYPE_CODE (values from Code Table 550).	Conversion impact		Yes
CA-200366	Online	**FC_AGE_RATIO –** adding the CCR_RATIO_CODE column that already exists in C-IV	Conversion impact		Yes
CA-200366	Online	**LIC table –** Dropping columns STATE_PGM_NUM_IDENTIF_1, STATE_PGM_NUM_IDENTIF_2, STATE_PGM_NUM_IDENTIF_3	Conversion impact		Yes
CA-200366	Online	**ORG_STATE_PGM_NUM table –** adding this table that C-IV already has with the addition of a foreign key to the ORG_TYPE_ORG	Conversion impact		Yes

6 APPENDIX

6.1 Placement Type to Ratio Detail Page Mode Mapping

Placement Type	Single Ratio	CCR Ratio Only	CCR & non-CCR Ratio
Group Home	X		
Out of State Group Home	X		
Short Term Residential Therapeutic Program	X		
Transitional Housing Placement + FC (THP+FC)	X		
Transitional Housing Placement Program (THPP)	X		
Foster Family Agency (Intensive Programs)			X
Foster Family Agency (Nontreatment)			X
Foster Family Agency (Treatment)			X
Multidimensional			X
Foster Family Agency		X	
Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)		X	
Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)		X	

Any Placement Type not listed above will display in non-CCR mode only.

6.2 Placement Types That Require a State Program Number

	Placement Type
1	Foster Family Agency
2	Foster Family Agency (Intensive Programs)
3	Foster Family Agency (Nontreatment)
4	Foster Family Agency (Treatment)
5	Community Treatment Facility
6	Group Home
7	Foster Family Agency Certified Resource Family Home (FFACRFH) (Nontreatment)
8	Foster Family Agency Certified Resource Family Home (FFACRFH) (Treatment)
9	Short Term Residential Therapeutic Program
10	Transitional Housing Placement+FC (THP+FC)
11	Transitional Housing Placement Program (THPP)

6.3 Technical Notes

Category Name	Values	New or Existing	Id	Notes
State Program Number	ISFC non-ISFC	New	529	Exists in C-IV
Organization Type Code	Foster Family Agency (Organization Type Abbreviation is "FFA"; value is currently end-dated in LRS)	Existing	298	
Organization Type Code	Single Ratio Indicator (Reference column)	New	298	Exists in C-IV
Organization Type Code	Display Ratio Type (Reference column)	New	298	Exists in C-IV
Organization Type Code	State Program Number Required (Reference column)	Existing	298	Update for new selections.
Foster Care Facility Ratio Age Range Code	Code Value 05 "Age 15-21"	Existing	762	Rename from current value: "Age 15-18"
Foster Care Facility Ratio CCR Code	Basic, LOC 2, LOC 3, LOC 4	New	551	Exists in C-IV
Organization Type Code	CCR Ratio Only Indicator (Reference column)	New	298	

Categories updated in C-IV SCR 3933 and C-IV SCR 11142

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-201377

DDCR 10002: GA/GR Solution for C-IV Counties

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Taylor Fitzhugh, Esequiel Herrera-Ortiz, Stephanie Hugo, Peterson Etienne
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/20/2020	0.1	Initial Draft	
05/18/2020	0.2	Added recommendation to update the Report Search page and specific report parameter pages.	Esequiel Herrera-Ortiz
08/17/2020	1.0	Content Revision – Correspondence changes Including CalWIN GA/GR program code to reports Set default values for the Fiscal Authorization and Benefit Issuance Threshold of GM program Updated verbiage for section 2.1 added clarification regarding (Non-Managed) programs to section 2.2 Updated items f and g in section 2.6.3.9 to correctly reflect the General Assistance (Non-Managed) Person Detail page	Stephanie Hugo Esequiel Herrera-Ortiz Eric Wu Taylor Fitzhugh
10/23/2020	2.0	Content Revision 2 – Seperate section 2.45 DCR into 2.22 to update GM benefit issuance threshold and 2.23 to update GM payment/valuable request Authorizations Add 2.24 and 2.25 to update Humboldt County Pay Codes Updated section 2.16 to update the code detail table to make GA/GR, GM and GN public assistance Updated the verbiage for section 2.18.2. Removed obsolete row from the status reason in 2.21.2.3 and clarified 2.17.3 aid code validation and 2.17.3.4 removed obsolete issuance validation.	Eric Wu Peterson Etienne Stephanie Hugo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		Updated Forms Category for the two new forms to say "Forms" instead of Administrative (2.43.7, 2.43.8) 2.31.2. Removed EBT Repayment Detail Add a new entry "GA" Benefit type since this already exist in LRS 2.32.1.2. Included cause code and code hierarchy 2.27.3.1. Instead of "select" its "change" the program type and Removed the trigger condition "upon clicking Save and Return button" 2.19.3 Change two validations to trigger on the 'save and return' button for the 'override money managment'	
		Content Revision 3 2.4.3 Added the following note to item 2: Note: This validation will not occur under normal circumstances and cannot be triggered using current system functionality as the General Assistance programs are filtered based on county availability. 2.8.4 Updated Page location to: • **Global:** Case Info • **Local:** Case Summary • **Task:** Case Summary 2.34 Added section 2.34 Issuance Method Detail to add the following issuance method status reasons for 'GM' 2.49 Added technical note.	Peterson Etienne, Esequiel Herrera-Ortiz, Taylor Fitzhugh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR

Table of Contents

1 OVERVIEW

This SCR will migrate the existing functionality for the Managed and Non-Managed General Assistance/General Relief (GA/GR) programs from the C-IV system into the CalSAWS solution.

1.1 Current Design

The GA/GR solution in the CalSAWS system is designed to automate the rules for the Los Angeles county's implementation as well as the automation and monitoring of their GROW program. The C-IV implementation allows the users to enter and track the (GA/GR) program using manual EDBC and issuance, but does not track employment service activities for the 39 C-IV counties.

1.2 Requests

The GA/GR program will be expanded to support the creation and maintenance of the GA/GR program for the C-IV counties' GA/GR programs. Data entry fields required for the individual county GA/GR programs, related forms, and NOAs will be migrated. Impacted fiscal reports will be updated to generate for the migrated GA/GR programs.

1.3 Overview of Recommendations

1. Migrate the existing General Assistance (Managed) and General Assistance (Non-Managed) programs.
2. Update Data Collection pages to track information related to the migrated General Assistance programs
3. Update the Codes table to add General Assistance (Managed) program.
4. Add a new page: "General Assistance (Managed) EDBC (Manual)".
5. Update Program Configuration Detail to show 'Other' for GA (Managed) program.
6. Enable and update the 'Money Management' page.
7. Update the EDBC logic to include GA (Managed) program when determining other programs.
8. Update the Needs and Payment details to include GA (Managed) program benefit type and issuance delivery.
9. Add a validation for the Service Arrangement Detail.
10. Update the Valuable Request Detail Page.
11. Update the Issuance Detail and Un-Reimbursed Assistance Pool Detail to include GA (Managed) program.
12. Update EBT Repayment Detail and Recovery Account Detail to include GA (Managed) benefit type.
13. Update fiscal stagger date logic to include the GA (Managed) program.
14. Update the skip Issuance logic to include authorized GA (Managed) program.

15. Update the Benefit Issuance Pre-Claiming, Benefit Issuance Claiming, Service Payment Issuance Claiming, Valuables Claiming, Recovery Account Claiming batch jobs to include GA (Managed) program.
16. Update the Non-Foster Care Main Payroll, Future Monthly Supplemental, Nightly EDBC Issuance and Nightly EDBC Non-FC Issuance sweeps to include GA(Managed) programs.
17. Add new C-IV county-specific GA forms to the Template Repository.
18. Update existing fiscal reports specified in the Fiscal Reports section to generate for the Managed GA/GR program.
19. Update the Program parameter in the Report Search page to display the GA / GR program that is available to the county.
20. Update Payment/Valuable Request Authorization for General Assistance (Managed) to require 1st Level Authorization. Update County Benefit Issuance Thresholds to maintain current threshold functionalities for General Assistance (Managed).
21. Update General Assistance (Managed) Pay Codes for Humboldt County.

1.4 Assumptions

1. The General Assistance (Managed) program will be excluded from any existing LA county specific GA/GR EDBC Batch Sweeps.
2. The Manual EDBC page is the baseline page for all manual EDBC program so the existing fields is the same.
3. The General Assistance (Managed) page will have the same page mapping as the baseline manual EDBC page.
4. The General Assistance (Managed) is a manual only EDBC program.
5. The C-IV Migration Counties using the Managed GR program will not utilize the LA County GR automated EDBC rules.
6. The migration of C-IV SCR 951 to display the "Collect" button for EBT Service Payments will be managed by CA-299321 which is part of the 20.11 release.
7. Addition of the Pay Codes for the new General Assistance program will be done by SCR DDID 319.
8. Addition to the fund code mappings for the new General Assistance Aid Codes will be done by SCR DDID 319.
9. The enhancement made with CA-207353 as part of the 20.03 release to display multi-tier mileage rates will be available for the GA (Managed) program for the Need Category: Transportation and Type: Mileage-Private.
10. This SCR will migrate the existing Customer Need Program Mapping entries specific for General Assistance (Managed) in C-IV to CalSAWS. The reference columns in Customer Need Program Mapping used for authorization in CalSAWS for Need Category/Type will be managed by CA-213493 as part of the 20.11 release.
11. The update to the code hierarchy for Customer Need Category (CT 163) adding Limited Disability - Accommodation will be addressed in CA-207320 as part of the 21.01 release.

12. GA (Managed) program is not one of the associated programs as per the Housing Support Program fund policy.
13. GA (Managed) benefits will be excluded from the following Periodic Reporting and Redetermination Skip Issuance reasons:
    a. Periodic Report Not Received for the reporting period.
    b. Periodic Report Incomplete.
    c. Periodic Report Received After 10 Day is Not Complete.
    d. Periodic Report Does Not Exist for the Reporting Period.
    e. Recertification Received is Not Incomplete.
    f. Redetermination/Recertification not received for submit month.
    g. Redetermination received after 10-day cutoff is not complete.
    h. Redetermination/Recertification Does not Exists for submit month.
14. Existing fiscal reports that generate with GA/GR information will continue to function as normal.
15. The Money Management section will only be available for counties that opted-in for the GA (Managed) program.
16. The Money Management section will not be visible for LA county General Assistance program EDBC manual.
17. The C-IV forms being ported in this SCR will not be visible to LA county, this functionality to hide forms has been added through CA-214197 which is part of the 20.11 release.
18. The CalSAWS standard header to be used in this effort will be the updated Non-State form header implemented as part of CA-214196 which is part of the 20.11 release
19. All forms being added will have an imaging barcode. Imaging barcode functionality for non-tracked forms will be added through CA-207108, part of the 20.11 release.
20. Select forms to be implemented that are sent as standard mail will have the BRM barcode. BRM barcodes for standard mail will be added through CA-201214, part of the 20.11 release.
21. All forms added in this SCR will have the capability to be posted to the CalSAWS self-service Portal. This will be implemented through CA-216395 once details regarding the CalSAWS self-service portal are finalized.

2 RECOMMENDATIONS

2.1 Add an indicator to disable GA/GR functionality for C-IV counties

2.1.1 Overview

The GA/GR functionality will be implemented in waves and will not be required until other counties outside of LA have been migrated. The functionality will be disabled to prevent impacts to the LA GR workflow until the migration of the C-IV counties.

2.1.2 Description of Changes

Add an indicator that will allow all General Assistance (Managed) and General Assistance (Non-Managed) functionality to be activated and deactivated as a whole. This will be deactivated by default. The functionality shall be activated in work item CA-216163 at the time of the C-IV county go-live date.

2.2 Migrate the General Assistance Managed and Non-Managed programs

2.2.1 Description of Change

1. Migrate the existing General Assistance (Managed) and General Assistance (Non-Managed) programs from CT18 in C-IV. The General Assistance (Non-Managed) program will have its program code updated from 'GA' to 'GN' in order to not conflict with the General Assistance/General Relief program currently in the system. Reference Appendix item B for a list of reference table values. These values are the default values and are subject to change based on implementation needs throughout the document.
2. The following Counties will be marked as General Assistance (Managed) counties:
    a. Alpine
    b. Amador
    c. Butte
    d. Calaveras
    e. Colusa
    f. Del Norte
    g. Glenn
    h. Humboldt
    i. Imperial
    j. Inyo
    k. Kern
    l. Kings
    m. Lake

n. Lassen
o. Madera
p. Marin
q. Mariposa
r. Mendocino
s. Merced
t. Modoc
u. Mono
v. Monterey
w. Napa
x. Nevada
y. Plumas
z. Riverside
aa. San Benito
bb. San Joaquin
cc. Shasta
dd. Sierra
ee. Siskiyou
ff. Stanislaus
gg. Sutter
hh. Tehama
ii. Trinity
jj. Tuolumne
kk. Yuba

3. All C-IV counties not listed above will be marked as General Assistance (Non-Managed) counties. The General Assistance (Non-Managed) program will be available to all counties supporting either the General Assistance (Managed) or General Assistance (Non-Managed) programs.

2.3 Case Summary

2.3.1 Overview

The Case Summary page is the landing page when accessing a case. Each program and person that is present on the case will be displayed with their status for a given date in time. This page will be modified to allow the user to view and access the Managed and Non-Managed GA/GR programs.

2.3.2 Case Summary Mockup

7

Figure 2.3.2.1 – GA Managed (Pending)

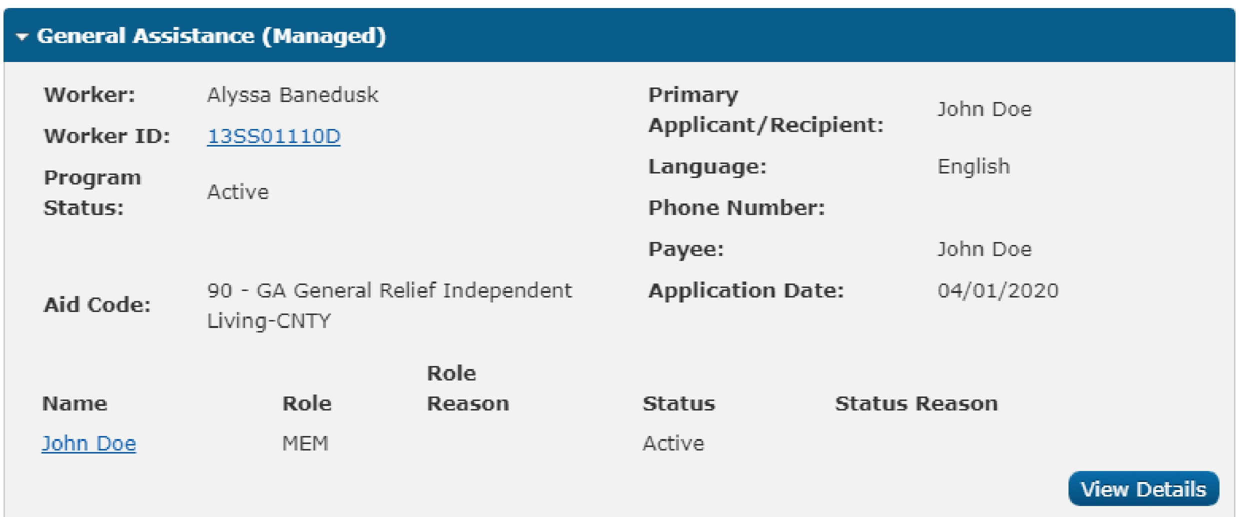


Figure 2.3.2.2 – GA Managed (Active/Denied/Ineligible)

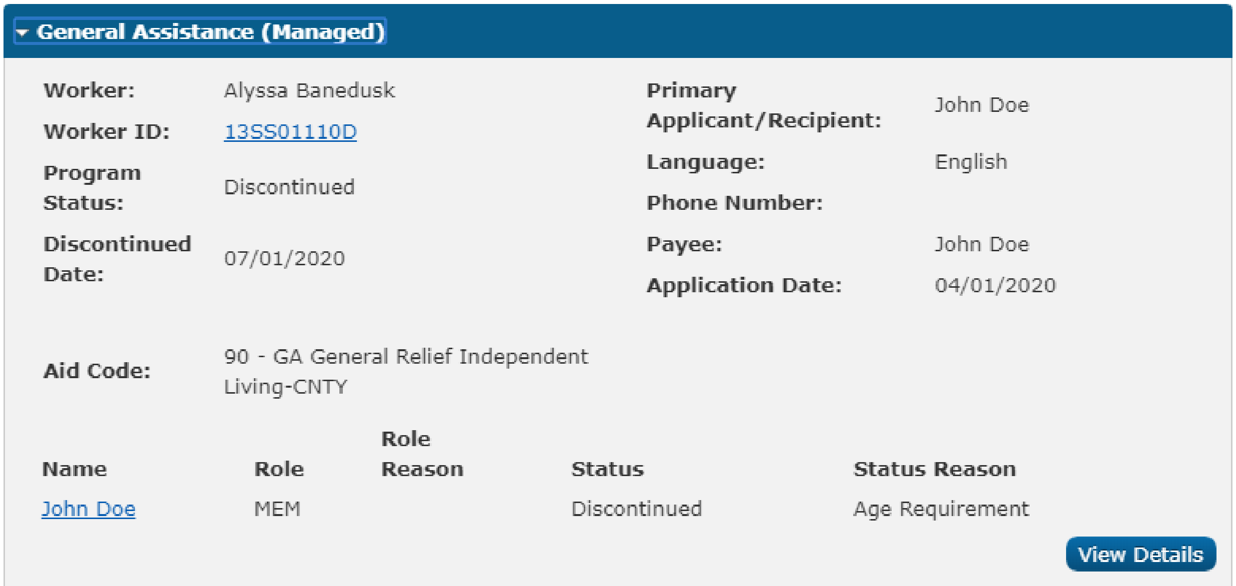


Figure 2.3.2.3 – GA Managed (Discontinued)

Figure 2.3.2.4 – GA Non-Managed (Not Discontinued)

Figure 2.3.2.5 – GA Non-Managed (Discontinued)

Figure 2.3.2.6 – GA Managed (Month prior to BDA)

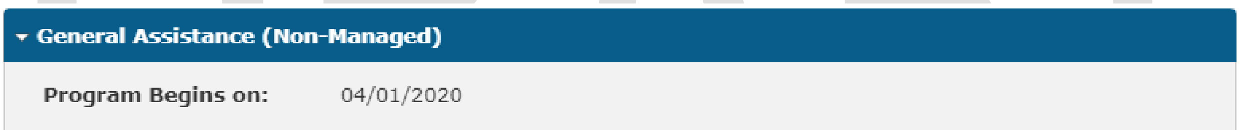


Figure 2.3.2.7 – GA Non-Managed (Month prior to BDA)

2.3.3 Description of Changes

1. Add sections for the General Assistance (Managed) and General Assistance (Non-Managed) programs. These blocks will display only for a date on or after the program's application date. When the view date is on or after the program's Beginning Date of Aid (BDA), the blocks will display with the following fields:
    a. Worker: The name of the staff assigned to the position that is assigned to the program.
    b. Worker ID: The Identifier for the position. This field will be a hyperlink to the Worker Detail page for the selected position. When no staff is assigned to the position, this field will be blank.
    c. Program Status: The status of the program on the given view Date.
    d. Discontinued Date: The date the program was Discontinued. This field will only display when the status of the program is discontinued.
    e. Aid Code: The aid code associated with the program. This field will not display for the General Assistance (Non-Managed).

   f. FBU: The Family Budget Unit for the program. This field will not display for the General Assistance (Managed) program.
   g. Primary Applicant/Recipient: The primary applicant of the program on the given view date.
   h. Language: The spoken Language of the primary applicant.
   i. Phone Number: The main phone number for the primary applicant.
   j. Payee: The Payee of the program on the given view date.
   k. Application Date: The date of the application associated to the status as of the given view date.
   l. Name: This field will list the names of all participants on the program. Each person will have their name displayed in a single row. Each name will be a hyperlink to the Program person Detail page for the program person selected, if the user has the 'PersonHistoryView' right associated to their profile.
   m. Role: The Role code of the program person at the given view date.
   n. Role Reason: The Reason the role was assigned at the given view date.
   o. Status: The status of the participant in the program at the given view date.
   p. Status Reason: The status reason of the participant's program status at the given view date.
   q. View Details: This button will navigate to the detail page for the associated program.
2. When the view date is on or after the application date of the program, but in a month prior to the BDA month, the block will display the field "Program Begins On". This field will display the BDA. (figures 2.3.2.6 and 2.3.2.7)

2.3.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.3.5 Security Updates

N/A

2.3.6 Page Mapping

Add page mappings for new fields that do not have page mappings.

2.3.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.4 Program Detail

2.4.1 Overview

The Program Detail page is used to select new programs to add to the case. In C-IV, if a General Assistance (Managed) program is elected in a county that does not support the General Assistance Managed program, then, validation is thrown preventing the program from being added. This functionality will be expanded to prevent any General Assistance program from being added to a county that does not support that General Assistance Program.

2.4.2 Program Detail Mockup

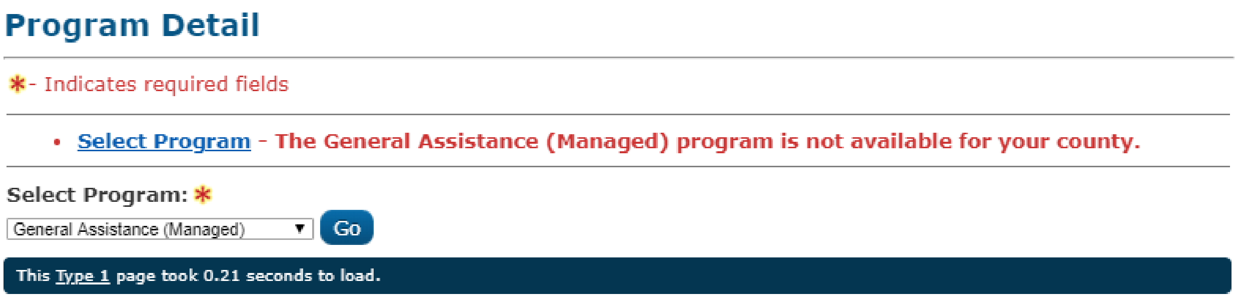


Figure 2.4.2.1 – Program Detail

2.4.3 Description of Changes

1. Add the General Assistance (Managed) and General Assistance (Non-Managed) programs to the Select Program dropdown.
2. When a General Assistance program is selected for a county that does not support that General Assistance program, display the following validation message, replacing <program name> with the name of the program: "The <program name> program is not available for your county."

   Note: This validation will not occur under normal circumstances and cannot be triggered using current system functionality as the General Assistance programs are filtered based on county availability.

2.4.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

No new page mappings are required.

2.4.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.5 New/Reapplication Detail

2.5.1 Overview

The New/Reapplication Detail page is used to add or reopen a program for an existing case. The display for this page will be specified for the General Assistance Managed and Non-Managed programs.

2.5.2 New/Reapplication Detail Mockup

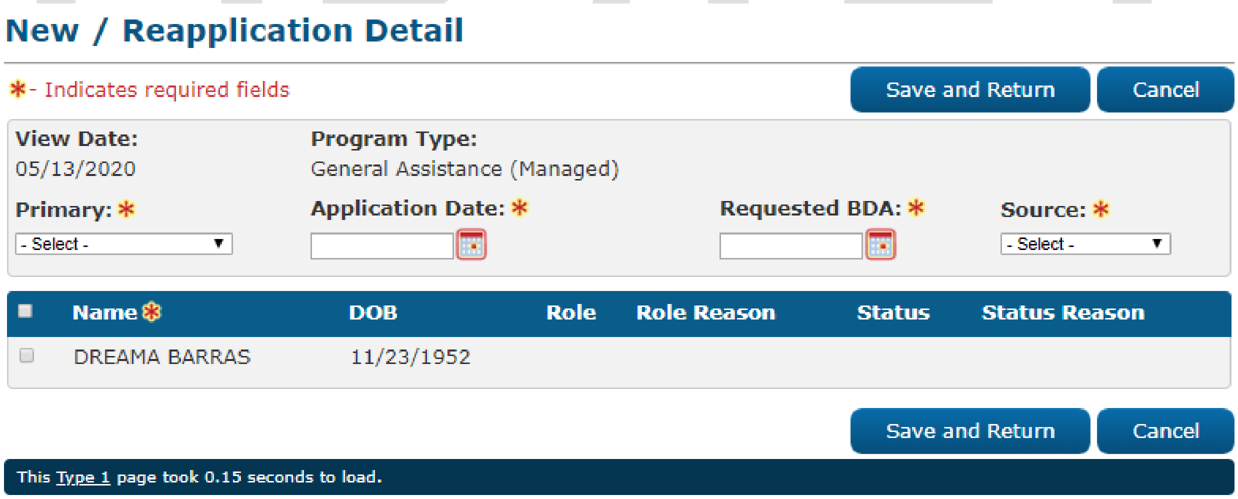


Figure 2.5.2.1 – New/Reapplication Detail

2.5.3 Description of Changes

1. Update the New/Reapplication page to display the following existing fields when the program is either 'General Assistance (Managed)' or 'General Assistance (Non-Managed)'. Standard page validation and logic will continue to apply:
    a. View Date: The Date the page is being accessed.

b. Program Type: The type of program.
c. Primary: The primary applicant of the program.
d. Application Date: The date the user applied to the program.
e. Requested BDA: The date the user is set to begin receiving aid from the program.
f. Source: The source of the application.

2. Display the result table containing the list of participants on the case to potentially add to the program. The result table will have a checkbox to select any individuals that may be added to the program and will display the following fields:
    a. Name: The Name of the participant.
    b. DOB: The participant's date of birth.
    c. Role: The participant's role code.
    d. Role Reason: The reason for the Role code, if any.
    e. Status: The participant's status on the program.
    f. Status Reason: The reason for the status, if any.

2.5.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** New Program

2.5.5 Security Updates

N/A

2.5.6 Page Mapping

No new page mappings for the existing page .

2.5.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.6 General Assistance (Non-Managed) Detail

2.6.1 Overview

The General Assistance (Non-Managed) Detail page will be the main view page for the General Assistance (Non-Managed) program. This page will show a collection of detailed information for the program and its participants at a specific date.

2.6.2 General Assistance (Non-Managed) Mockup

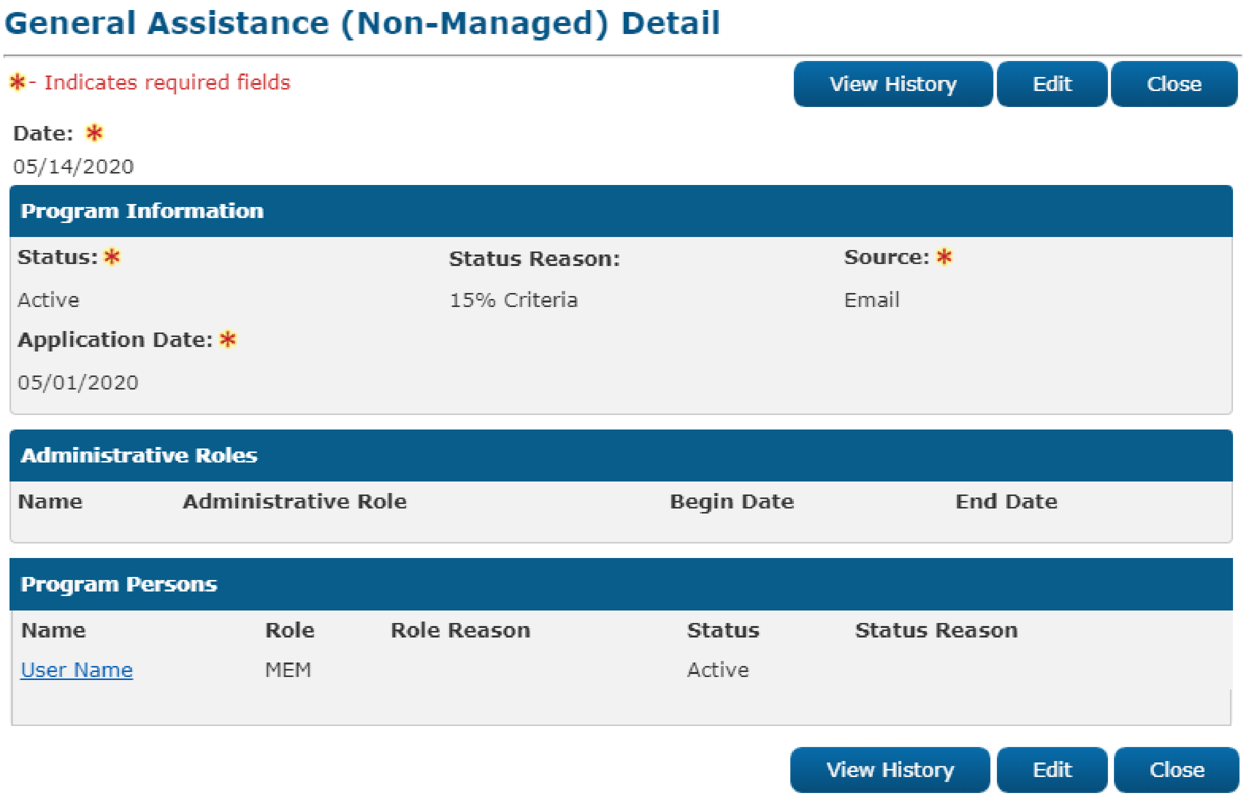


Figure 2.6.2.1 – GA Non-Managed

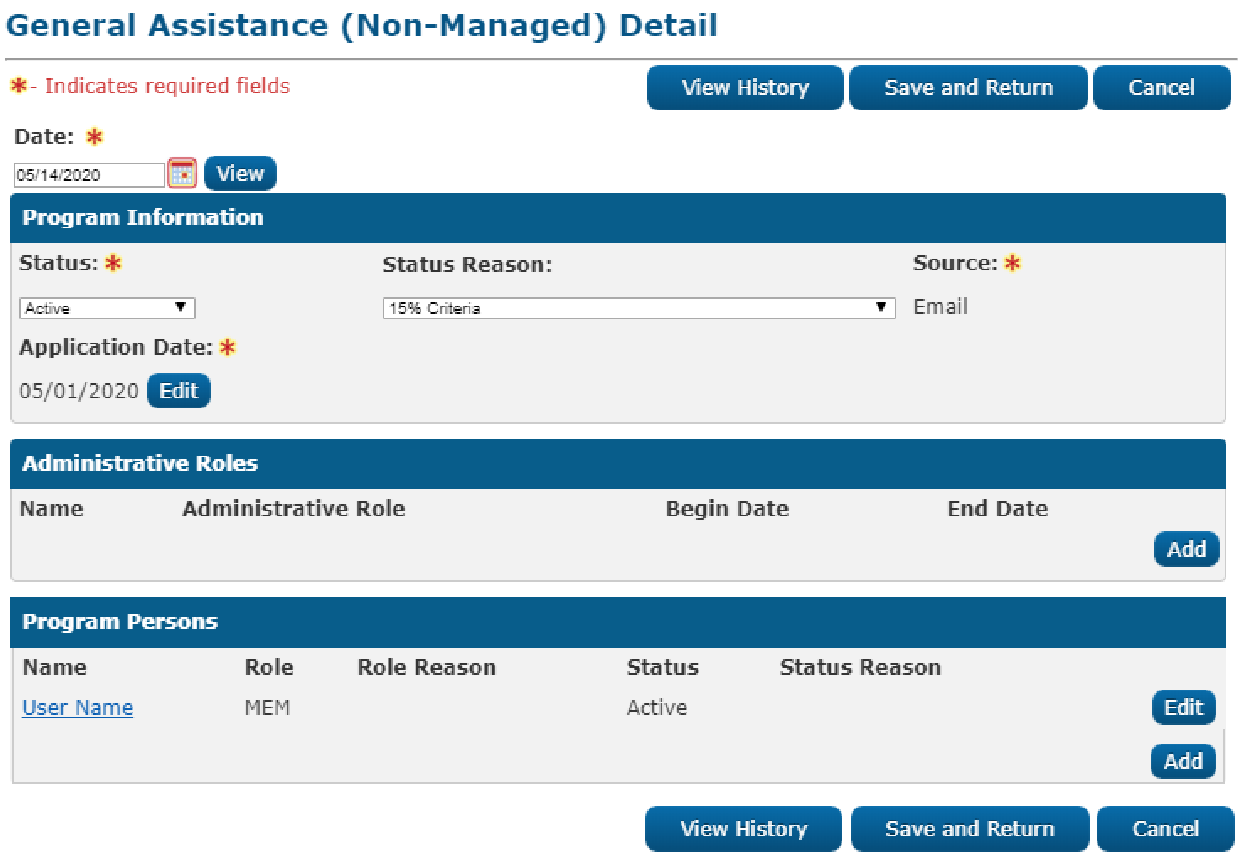


Figure 2.6.2.2 – GA Non-Managed

2.6.3 Description of Changes

1. View History button – This button will navigate the worker to the General Assistance (Non-Managed) History page.
2. Edit button – This button will refresh the page in 'Edit' mode. This button is only available in 'View' mode.
3. Close button – This button will navigate the worker to the Case Summary page. This button is only available in 'View' mode.
4. Save and Return button – Saves the changes that have been made to the General Assistance (Non-Managed) Detail page and will navigate the worker to the Case Summary page. This button is only available in 'Edit' mode.
5. Cancel button – Returns the worker to the Case Summary page. This button is only available in 'Edit' mode.
6. Date – Date which will be used to retrieve information for the page. The application that has a status as of the Date will have its information displayed. This is a required field.
    a. View Date button – Pressing this button will refresh the page with the program information as of the Date. This button is only available in 'Create'/'Edit' mode.
7. Program Information Section

a. Status – Status of the program as of the Date. This field is required. This will be a dropdown with the following options:
    i. Active
    ii. Deferred
    iii. Denied
    iv. Deregistered
    v. Discontinued
    vi. Exempt
    vii. Good Cause
    viii. Ineligible
    ix. Non-Comp
    x. Pending
    xi. Sanction
    xii. Waiting to Transfer
a. Status Reason – Reason for the value displayed in the Status column.
b. Source – Source of the application that is tied to the Status as of the Date. This field is required.
c. Application Date – Date of application for the application that is tied to the Status as of the Date. This field is required.
    i. Edit button – Pressing this button will navigate the worker to the Application Detail page.

8. Administrative Roles section
    a. Name - Name of the person assigned to the Administrative Roles as of the Date.
    b. Administrative Role – Administrative Role that is assigned to the person in the Name column.
    c. Begin Date – Date that the person in the Name column was assigned to the Administrative Role.
    d. End Date – Date that the person in the Name column ended the Administrative Role.
    e. Edit button – Navigate the worker to the Administrative Role Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.
    f. Add button - Navigate the worker to the Administrative Role Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.
9. Program Person section
    a. Name – Name of the Program Person.
    b. Role – Role of the Person as of the Date.
    c. Role Reason – Reason for the value displayed in the Role column.
    d. Status – Status of the Person as of the Date.
    e. Status Reason – Reason for the value displayed in the Status column.
    f. Edit button – Navigates the worker to the General Assistance (Non-Managed) Person Detail page in 'Edit' mode. This button is only available in 'Create'/'Edit' mode.

g. Add button – Navigates the worker to the General Assistance (Non-Managed) Person Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.

2.6.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.6.5 Security Updates

N/A

2.6.6 Page Mapping

Add page mappings for new page.

2.6.7 Page Usage/Data Volume Impacts

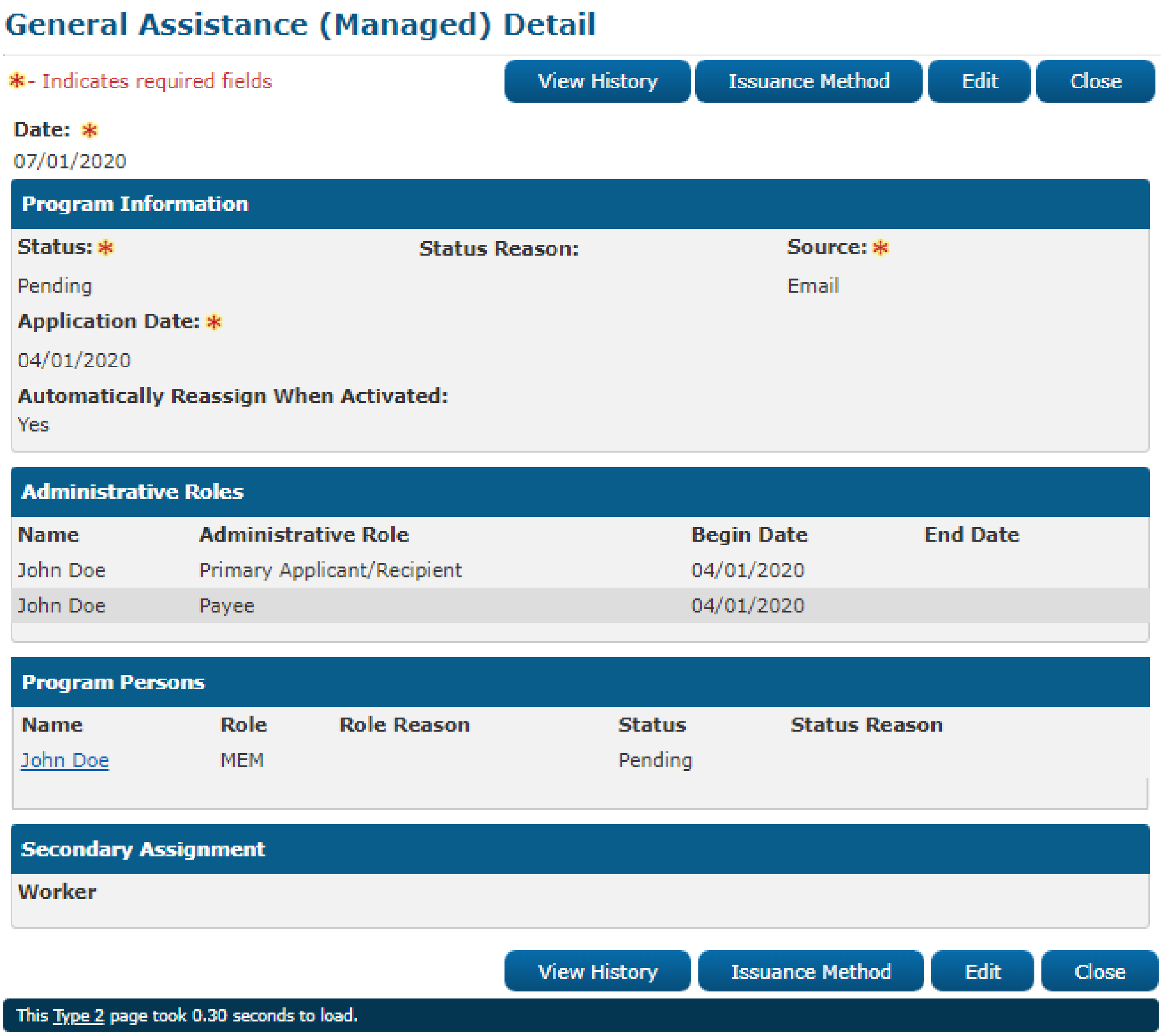
No additional page usage is expected from this update.

2.7 General Assistance (Managed) Detail

2.7.1 Overview

The General Assistance (Managed) Detail page will be the main view page for the General Assistance (Managed) program. This page will show a collection of detailed information for the program and its participants at a specific date.

2.7.2 General Assistance (Managed) Mockup



General Assistance (Managed) Detail

*- Indicates required fields

View History | Issuance Method | Edit | Close

Date: *

07/01/2020

Program Information

Status: * Pending

Status Reason:

Source: * Email

Application Date: * 04/01/2020

Automatically Reassign When Activated: Yes

Administrative Roles

Name	Administrative Role	Begin Date	End Date
John Doe	Primary Applicant/Recipient	04/01/2020	
John Doe	Payee	04/01/2020	

Program Persons

Name	Role	Role Reason	Status	Status Reason
John Doe	MEM		Pending	

Secondary Assignment

Worker

View History | Issuance Method | Edit | Close

This Type 2 page took 0.30 seconds to load.

Figure 2.7.2.1 – GA Managed (View Mode)

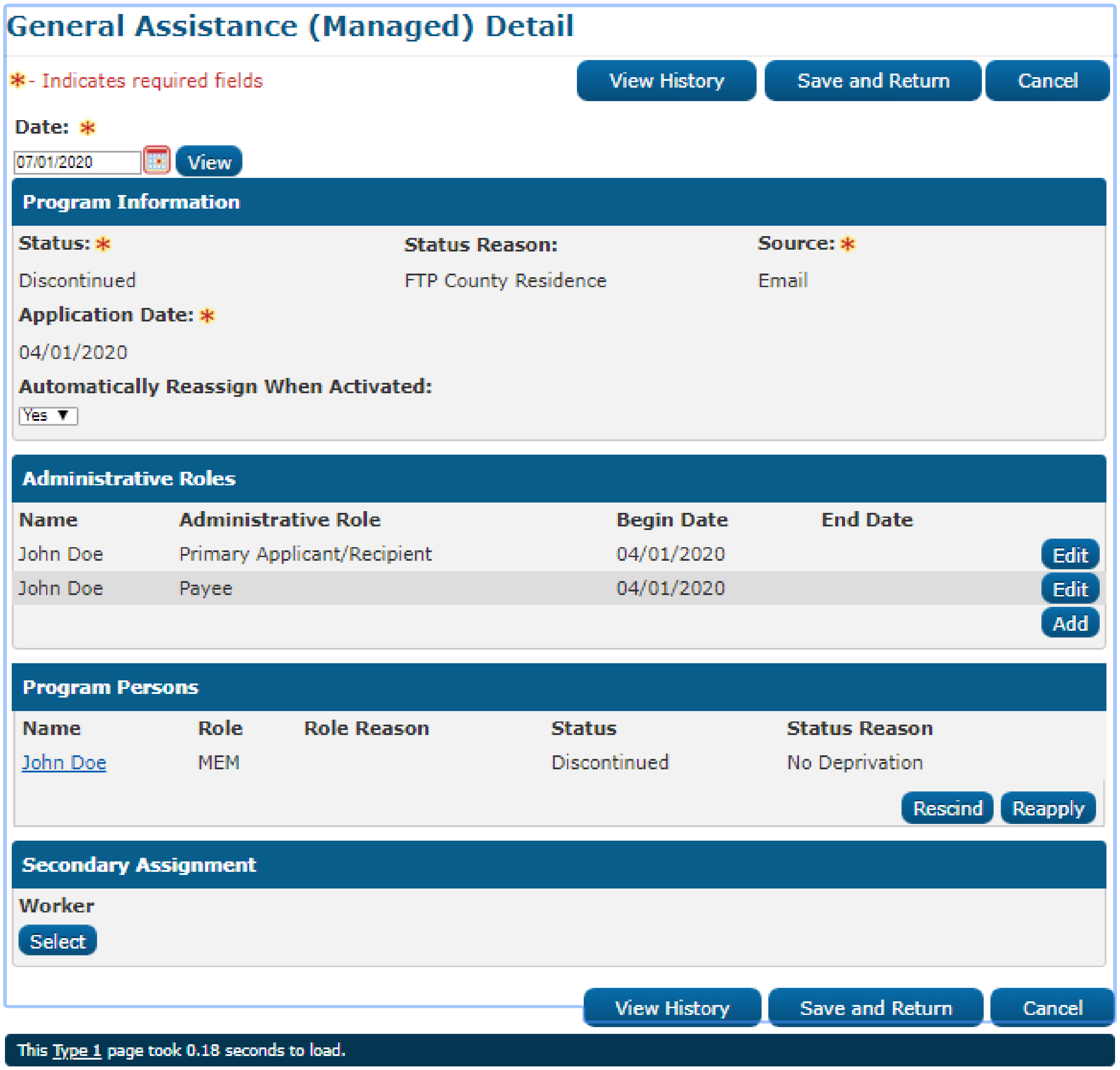


Figure 2.7.2.2 – GA Managed (Edit Mode)

2.7.3 Description of Changes

1. View History button – This button will navigate the worker to the General Assistance (Managed) History page.
2. Edit button – This button will refresh the page in 'Edit' mode. This button is only available in 'View' mode.
3. Close button – This button will navigate the worker to the Case Summary page. This button is only available in 'View' mode.
4. Save and Return button – Saves the changes that have been made to the General Assistance (Managed) Detail page and will navigate the worker to the Case Summary page. This button is only available in 'Edit' mode.

5. Cancel button – Returns the worker to the Case Summary page. This button is only available in ‘Edit’ mode.
6. Date – Date which will be used to retrieve information for the page. The application that has a status as of the Date will have its information displayed. This is a required field.
    a. View Date button – Pressing this button will refresh the page with the program information as of the Date. This button is only available in ‘Create’/’Edit’ mode.
7. Program Information Section
    a. Status – Status of the program as of the Date. This field is required.
    b. Status Reason – Reason for the value displayed in the Status column.
    c. Source – Source of the Application that is tied to the Status as of the Date. This field is required.
    d. Application Date – Date of application for the application that is tied to the Status as of the Date. This field is required.
        i. Edit button – Pressing this button will navigate the worker to the Application Detail page.
8. Administrative Roles section
    a. Name - Name of the person assigned to the Administrative Roles as of the Date.
    b. Administrative Role – Administrative Role that is assigned to the person in the Name column.
    c. Begin Date – Date that the person in the Name column was assigned to the Administrative Role.
    d. End Date – Date that the person in the Name column ended the Administrative Role.
    e. Edit button – Navigate the worker to the Administrative Role Detail page in ‘Edit’ mode. This button is only available in ‘Create’/’Edit’ mode.
    f. Add button - Navigate the worker to the Administrative Role Detail page in ‘Create’ mode. This button is only available in ‘Create’/’Edit’ mode.
9. Program Person section
    a. Name – Name of the Program Person.
    b. Role – Role of the Person as of the Date.
    c. Role Reason – Reason for the value displayed in the Role column.
    d. Status – Status of the Person as of the Date.
    e. Status Reason – Reason for the value displayed in the Status column.
    f. Edit button – Navigates the worker to the General Assistance (Managed) Person Detail page in ‘Edit’ mode. This button is only available in ‘Create’/’Edit’ mode.
    g. Rescind button – Navigates the worker to the Rescind Detail page. This button is only available in ‘Create’/’Edit’ mode.

h. Reapply button – Navigates the worker to the New/Reapplication detail page. This button is only available in 'Create'/'Edit' mode.
i. Add button – Navigates the worker to the General Assistance (Managed) Person Detail page in 'Create' mode. This button is only available in 'Create'/'Edit' mode.

10. Secondary Worker Assignment section
    a. Worker – Name of the Worker that is assigned as a secondary assignment. Clicking on the Worker will navigate the worker to the Worker Detail page.
        i. Select button – Pressing button will navigate the worker to the Select Worker page to find a worker for the secondary assignment. This button is only available in 'Create'/'Edit' mode.
        ii. Remove button – Pressing the button will Remove the secondary assignment. This button is only available in 'Create'/'Edit' mode.

2.7.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.7.5 Security Updates

N/A

2.7.6 Page Mapping

Add page mappings for new page.

2.7.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.8 Administrative Role Detail

2.8.1 Overview

The Administrative Role Detail page is used to assign administrative roles to the program such as Payee and Primary applicant. This page will be updated to have unique options for the migrated General Assistance programs.

2.8.2 Administrative Detail Mockup

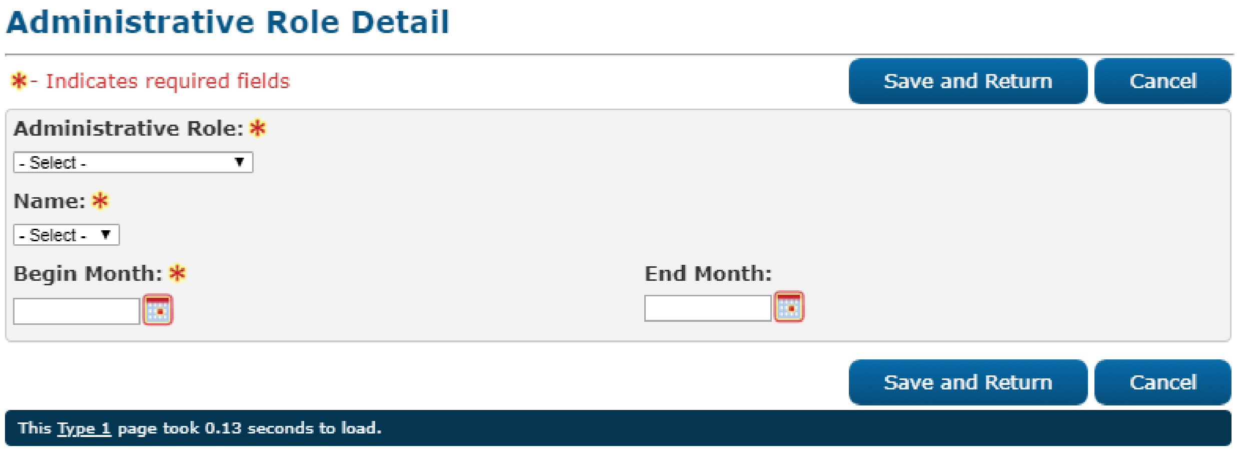


Figure 2.8.2.1 – Administrative Role Detail

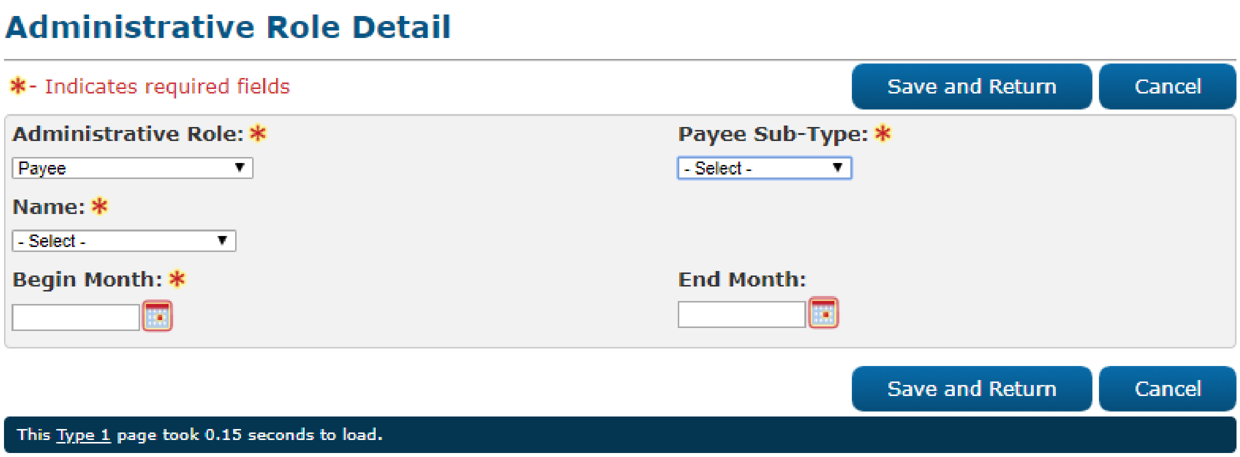


Figure 2.8.2.1 – Administrative Role Detail (Payee Selected)

2.8.3 Description of Changes

1. Update the Administrative Role field to display the following options when the program type is General Assistance (Managed):
   a. Payee
   b. Primary Applicant/ Recipient
2. Update the Administrative Role field to display only the 'Primary Applicant/ Recipient 'option when the program type is General Assistance (Non-Managed):

   Note: All existing page logic tied to these fields will continue to apply.

2.8.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.8.5 Security Updates

N/A

2.8.6 Page Mapping

No new page mappings for the existing page.

2.8.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.9 Rescind Detail

2.9.1 Overview

The Rescind Detail page is used to reopen denied and discontinued programs. Each program has a unique set of rescind reasons based on the date and status of the program being rescinded.

2.9.2 Rescind Detail Mockup

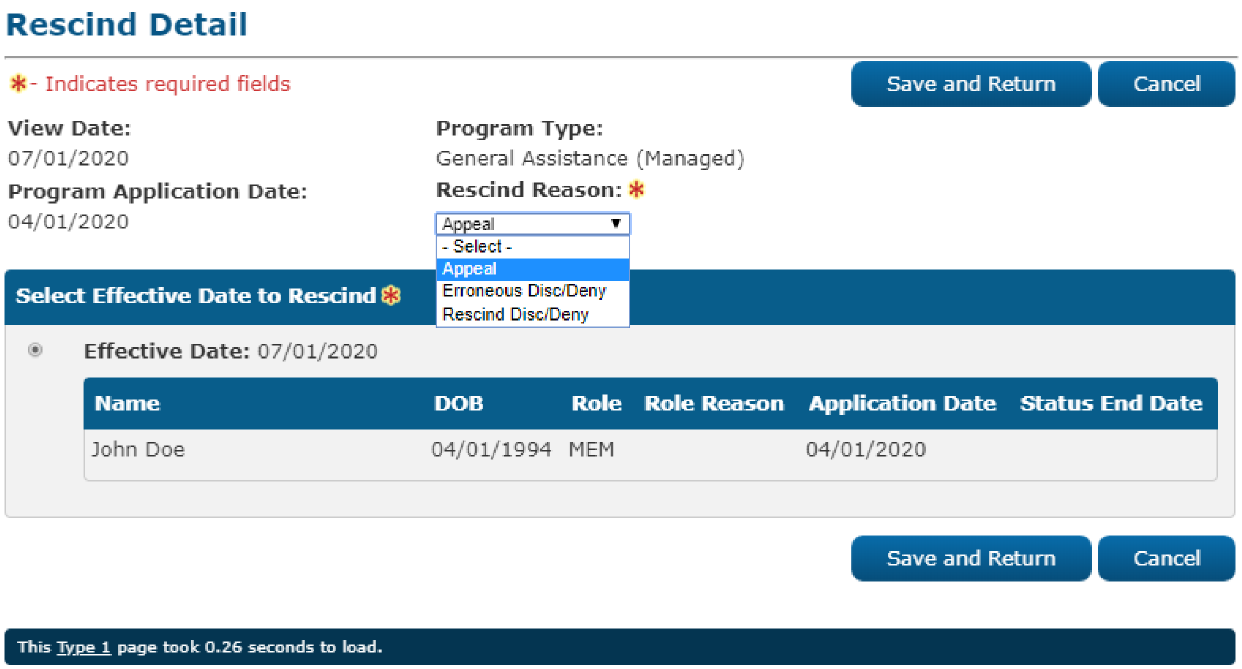


Figure 2.9.2.1 – Rescind Detail (Discontinuance)

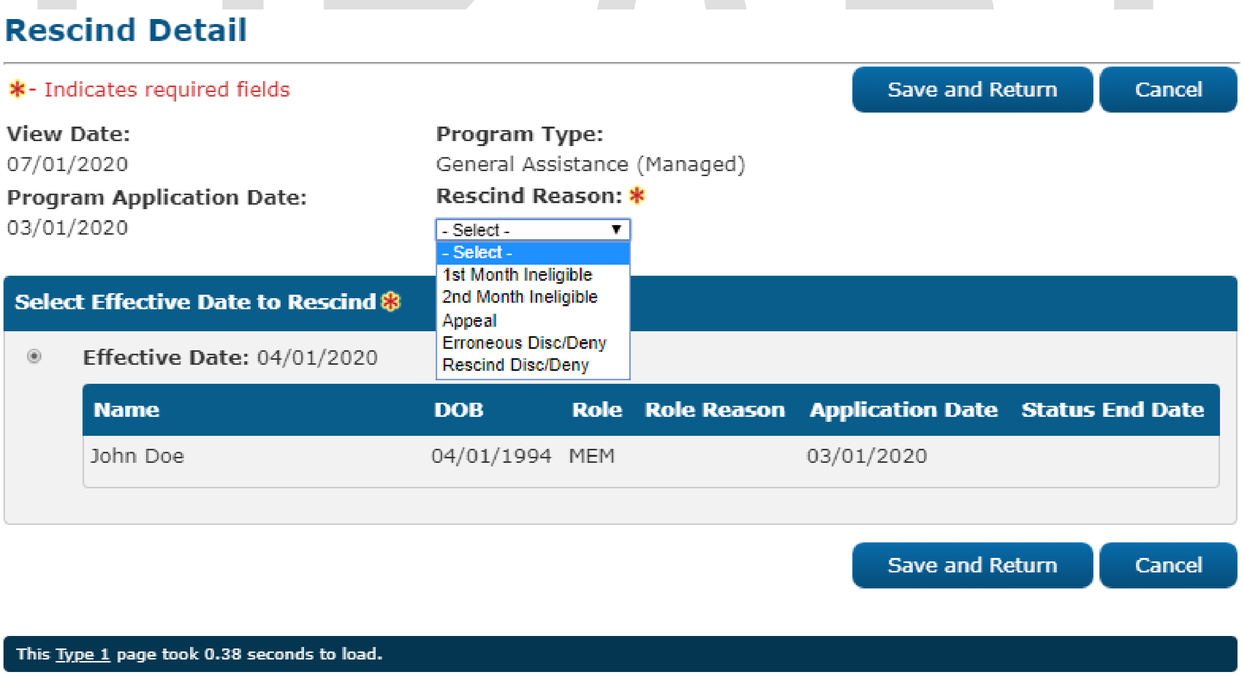


Figure 2.9.2.2 – Rescind Detail (Denied)

2.9.3 Description of Changes

1. Display the following options when rescinding a Denied status for the General Assistance (Managed) program.

   a. 1st Month Ineligible
   b. 2nd Month Ineligible
   c. Appeal
   d. Erroneous Disc/Deny
   e. Rescind Disc/Deny

   Note: 1st Month Ineligible and 2nd Month Ineligible options will be removed from the list based on existing logic, if applicable.
2. Display the following options when rescinding a Discontinued status for the General Assistance (Managed) program.
   a. Appeal
   b. Erroneous Disc/Deny
   c. Rescind Disc/Deny

2.9.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.9.5 Security Updates

N/A

2.9.6 Page Mapping

No page mappings required.

2.9.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.10 General Assistance (Managed) Person Detail

2.10.1 Overview

The General Assistance (Managed) Person Detail page will display detailed information for the General Assistance (Managed) program person.

2.10.2 General Assistance (Managed) Person Detail Mockup

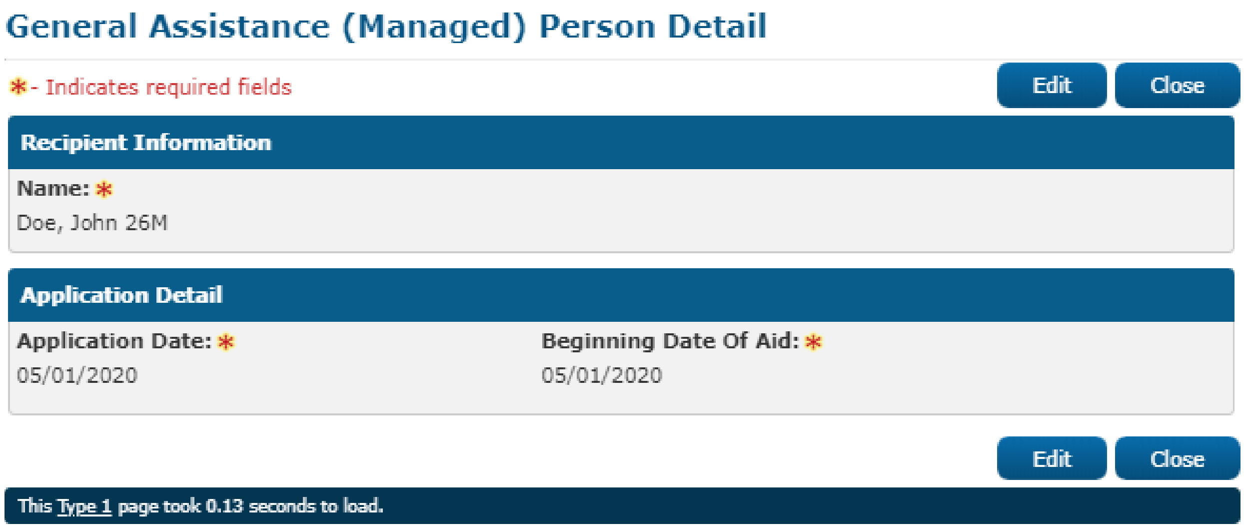


Figure 2.10.2.1 – GA Managed Person Detail (View)

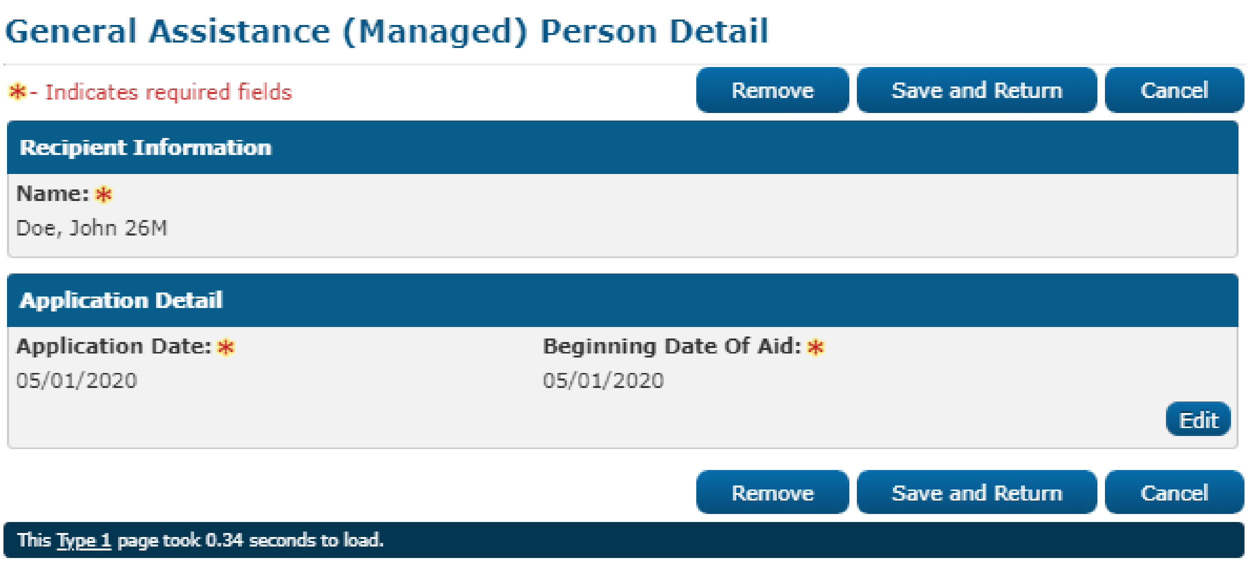


Figure 2.10.2.2 – GA Managed Person Detail (Edit)

2.10.3 Description of Changes

1. Display the Recipient Information section with the name field. The Name will display in the format: "Last Name, First Name AgeGender". This field will be a multi select dropdown in Create Mode.
2. Display the Application Detail Section with the following fields
    a. Application Date: The Date of the person's application for the status related to the view month from the General Assistance (Managed) Detail page. This field will only be editable in Create Mode. This field will have the standard Date constraint and calendar icon, when editable.

b. Beginning Date of Aid: The BDA of the person's application for the status related to the view month from the General Assistance (Managed) Detail page. This field will only be editable in Create Mode. This field will have the standard Date constraint and calendar icon, when editable.
c. Edit: This button will navigate the user to the Application Detail page in Edit Mode. This button will only display in Edit mode.

3. Display the following buttons at the top and bottom of the page:
   a. Cancel: This button will only display in Create and Edit Mode. This button will navigate the user to the General Assistance (Managed) Detail page.
   b. Close: This button will only display in View Mode. This button will navigate the user to the General Assistance (Managed) Detail page.
   c. Edit: This button will only display in View Mode. This button will reload the General Assistance (Managed) Person Detail page in Edit Mode.
   d. Remove: This button will only display in Edit Mode. This button will remove the program person from the General Assistance Managed program and navigate the user to the General Assistance (Managed) Detail page.
   e. Save and Return: This button will commit any changes that have been made on the page and navigate the user to the General Assistance (Managed) Detail page. This button will only appear in Create and Edit modes.

2.10.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.10.5 Security Updates

N/A

2.10.6 Page Mapping

Add page mappings for the new page.

2.10.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.11 General Assistance (Non-Managed) Person Detail

2.11.1 Overview

The General Assistance (Non-Managed) Person Detail page will display detailed information for the General Assistance (Non-Managed) program person.

2.11.2 General Assistance (Non-Managed) Person Detail Mockup

Figure 2.11.2.1 – GA Non-Managed Person Detail

2.11.3 Description of Changes

1. Display the Recipient Information section with the name field. The Name will display in the format: "Last Name, First Name AgeGender". This field will be a multi select dropdown in Create Mode.
2. Display the Application Detail Section with the following fields
   a. Application Date: The Date of the person's application for the status related to the view month from the General Assistance (Non-Managed) Detail page. This field will only be editable in Create Mode. This field will have the standard Date constraint and calendar icon, when editable.
   b. Beginning Date of Aid: The BDA of the person's application for the status related to the view month from the General Assistance (Non-Managed) Detail page. This field will only be editable in Create Mode. This field will have the standard Date constraint and calendar icon, when editable.

c. Edit: This button will navigate the user to the Application Detail page in Edit Mode. This button will only display in Edit mode.

3. Display a sub-section with the following fields:
    a. Status: This field will only be editable in Create and Edit modes. This will be a dropdown with the following options:
        i. Active
        ii. Deferred
        iii. Denied
        iv. Deregistered
        v. Discontinued
        vi. Exempt
        vii. Good Cause
        viii. Ineligible
        ix. Non-Comp
        x. Pending
        xi. Sanction
        xii. Waiting to Transfer
    b. Status Reason: This field will only be editable in Create and Edit modes. This field will display a list of status reason options.
4. Display the following buttons at the top and bottom of the page:
    a. Cancel: This button will only display in Create and Edit Mode. This button will navigate the user to the General Assistance (Non-Managed) Detail page.
    b. Close: This button will only display in View Mode. This button will navigate the user to the General Assistance (Non-Managed) Detail page.
    c. Edit: This button will only display in View Mode. This button will reload the General Assistance (Non-Managed) Person Detail page in Edit Mode.
    d. Remove: This button will only display in Edit Mode. This button will remove the program person from the General Assistance (Non-Managed) program and navigate the user to the General Assistance (Non-Managed) Detail page.
    e. Save and Return: This button will commit any changes that have been made on the page and navigate the user to the General Assistance (Non-Managed) Detail page. This button will only appear in Create and Edit modes.

2.11.4 Page Location

- **Global:** Case Info
- **Local:** Case Summary
- **Task:** Case Summary

2.11.5 Security Updates

N/A

2.11.6 Page Mapping

Add page mappings for the new page.

2.11.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.12 Money Management List

2.12.1 Overview

The Money Management List page displays a listing of the money management records associated with the case. This page will be updated to display the General Assistance program associated with the county.

2.12.2 Money Management List Mockup

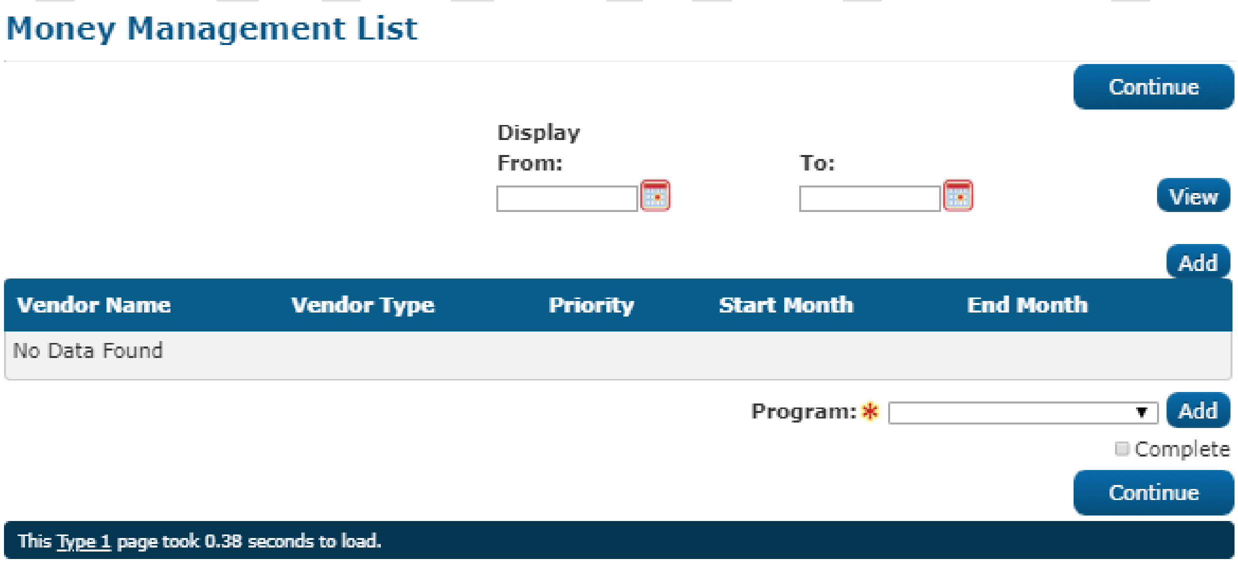


Figure 2.12.2.1 – Money Management List

2.12.3 Description of Changes

1. Update the program field to display the General Assistance (Managed) option. This option will only display if the user is in a county that supports the General Assistance (Managed) program.

2. The logic for displaying programs will be updated to display the General Assistance/ General Relief program related to the county of the logged in user.
3. The validation that prevents the user from creating a Money Management record for a program that is not on the case will be expanded to include the General Assistance (Managed) program.

2.12.4 Page Location

- **Global:** Eligibility
- **Local:** Customer information
- **Task:** Money Mngmt

2.12.5 Security Updates

N/A

2.12.6 Page Mapping

No page mapping updates.

2.12.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.13 Money Management Detail

2.13.1 Overview

The money management detail page is used to track payment limits to vendors for housing, utilities and other vendor types. This page will be updated to display options specific to the General Assistance (Managed) program.

2.13.2 Money Management Detail Mockup

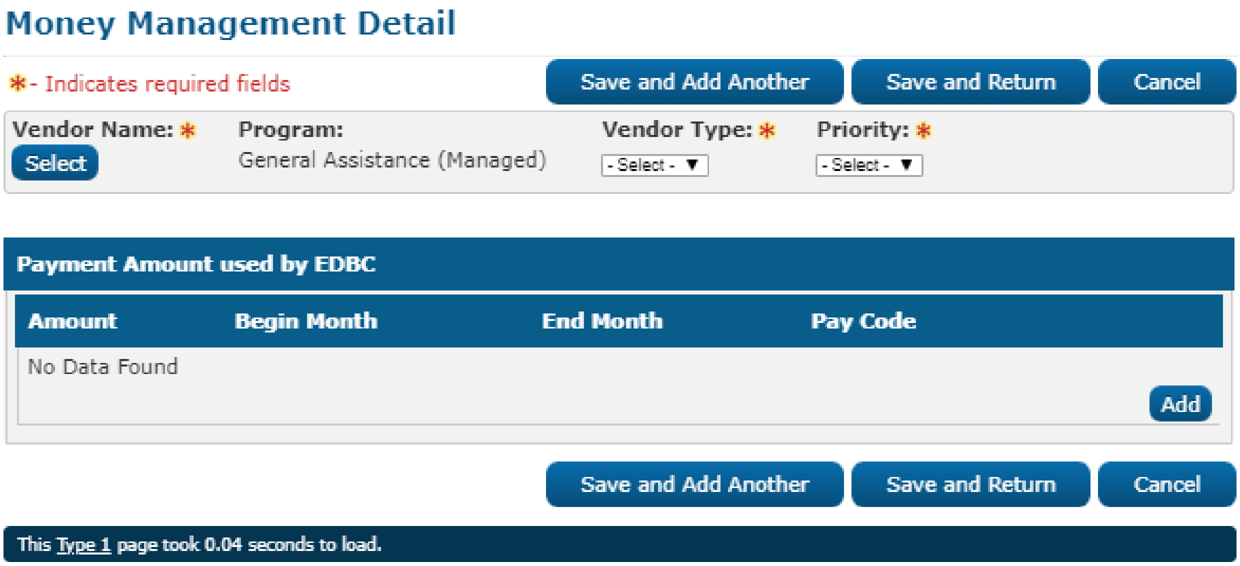


Figure 2.13.2.1 – Money Management Detail

2.13.3 Description of Changes

1. Display the following fields when the program type is 'General Assistance (Managed)':
    a. Vendor Type – This field will display the name of the vendor associated with the money. This field will also have a Select button that will link the user to the 'Select Money Management Resource page' when in Create or Edit Mode.
    b. Program – This field will display the program associated to the Money Management Detail record.
    c. Vendor Type – This field will be a required dropdown with the following options:
        i. – Select –
        ii. Other
        iii. Housing
        iv. Utilities
    d. Priority – This field will be a required dropdown with the following options:
        i. – Select –
        ii. 1
        iii. 2
        iv. 3
        v. 4
        vi. 5
        vii. 6
        viii. 7
        ix. 8

x. 9
xi. 10

2. Display the Payment Amount Used by EDBC Section. This section will use the currently existing logic and fields.

   Note: The select options will only appear when no value exists for the field and will act as the default value, if no value is selected.

2.13.4 Page Location

- **Global:** Eligibility
- **Local:** Customer Information
- **Task:** Money Mngmt

2.13.5 Security Updates

N/A

2.13.6 Page Mapping

No new page mappings for the existing page.

2.13.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.14 Position Detail

2.14.1 Overview

The Position Detail page is used to record information to help regulate the worker's access, capabilities and caseload capacity. This page contains a section for programs that a worker can be automatically assigned to that will be updated to include the migrated General Assistance (Managed) program.

2.14.2 Position Detail Mockup

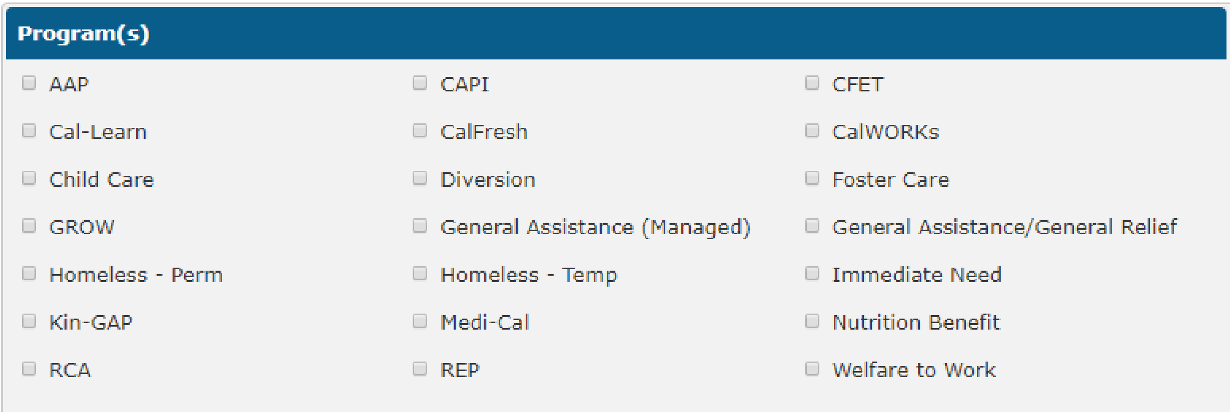


Figure 2.14.2.1 – Position Detail (Program Section)

2.14.3 Description of Changes

Add the General Assistance (Managed) program to the program Section on the Position Detail page. The default alphabetical ordering will continue to apply.

2.14.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Admin
- **Task:** Position

2.14.5 Security Updates

N/A

2.14.6 Page Mapping

No new page mappings for the existing page.

2.14.7 Page Usage/Data Volume Impacts

No additional page usage is expected from this update.

2.15 Update Authorization logic

2.15.1 Overview

Update the authorization logic to include GA (Managed) program.

2.15.2 Description of Changes

1. Update the Authorization logic to include GA (Managed) program.

2.16 Update EDBC logic

2.16.1 Overview

Update EDBC logic to reference GA (Managed) and GA (Non-Managed) program when determining for other programs. Also, send EBT benefit type "GA" via host to host when rushing a General Assistance (Managed) program code "GM" issuance on the EDBC summary page.

Make GA/GR, GA (managed) and GR (Non-managed) program be considered public assistance.

2.16.2 Description of Changes

1. Update EDBC logic to use General Assistance (Managed) and General Assitance (Non-managed) payments as unearned income for CalFresh.
2. Update the code detail table to make GA/GR, GA (managed) and GA (Non-managed) be considered public assistance.

2.16.3 Programs Impacted

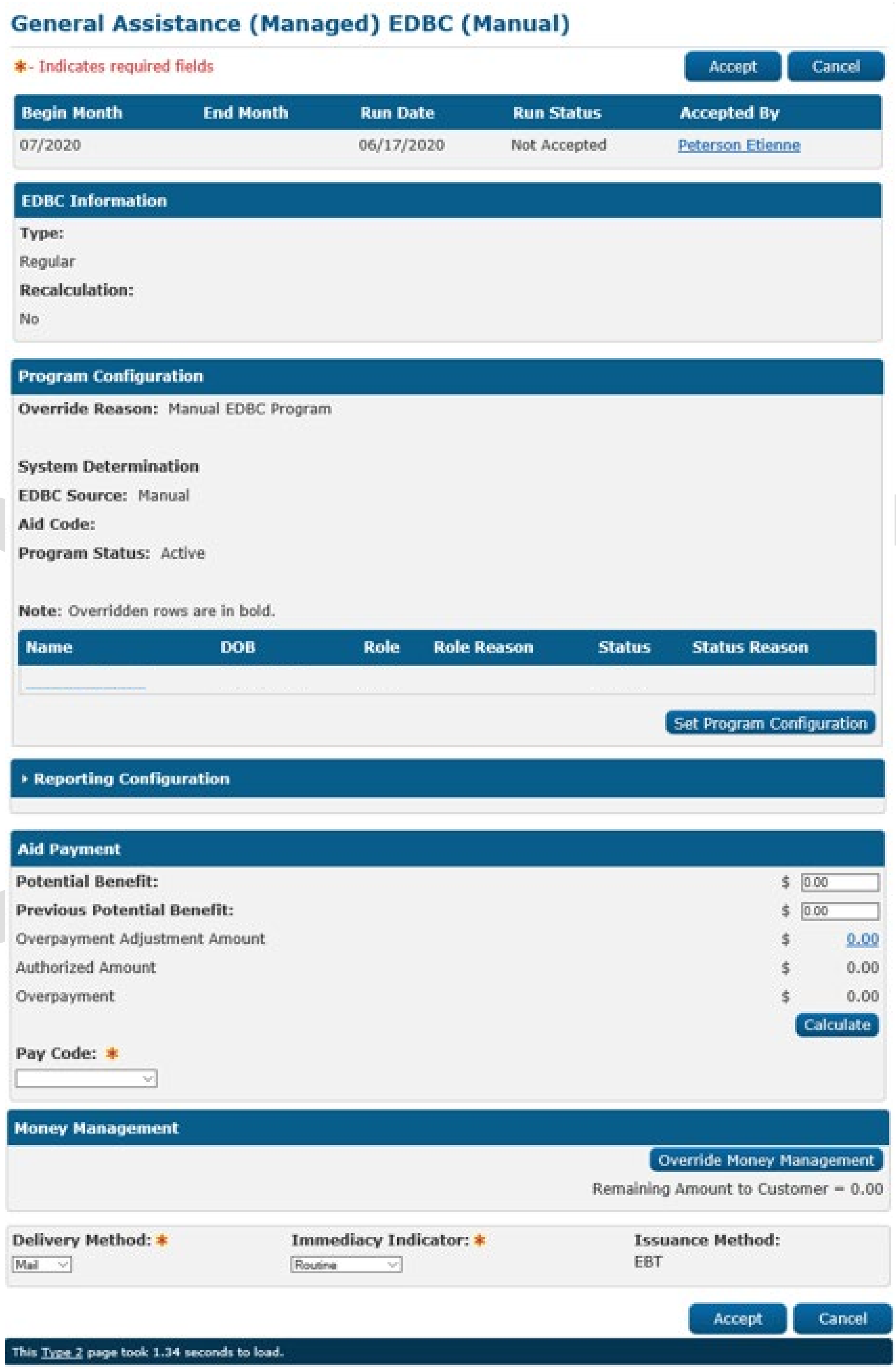
Cal fresh.

2.17 Add a new page: General Assistance (Managed) Manual EDBC

2.17.1 Overview

Add a new General Assistance (Managed) EDBC page to the CalSAWS System". Include on the "General Assistance (Managed) EDBC (Manual)" page the 'Money Management' section.

2.17.2 General Assistance (Managed) EDBC (Manual) Mockup


General Assistance (Managed) EDBC (Manual)

*- Indicates required fields

Accept Cancel

Begin Month	End Month	Run Date	Run Status	Accepted By
07/2020		06/17/2020	Not Accepted	Peterson Etienne

EDBC Information

Type:
Regular
Recalculation:
No

Program Configuration

Override Reason: Manual EDBC Program

System Determination
EDBC Source: Manual
Aid Code:
Program Status: Active

Note: Overridden rows are in bold.

Name	DOB	Role	Role Reason	Status	Status Reason

Set Program Configuration

Reporting Configuration

Aid Payment

Potential Benefit:	$	0.00
Previous Potential Benefit:	$	0.00
Overpayment Adjustment Amount	$	0.00
Authorized Amount	$	0.00
Overpayment	$	0.00

Calculate

Pay Code: *

Money Management

Override Money Management

Remaining Amount to Customer = 0.00

Delivery Method: * Mail
Immediacy Indicator: * Routine
Issuance Method: EBT

Accept Cancel

This Type 2 page took 1.34 seconds to load.

Figure 2.17.2.1 – GA (Managed) EDBC Manual

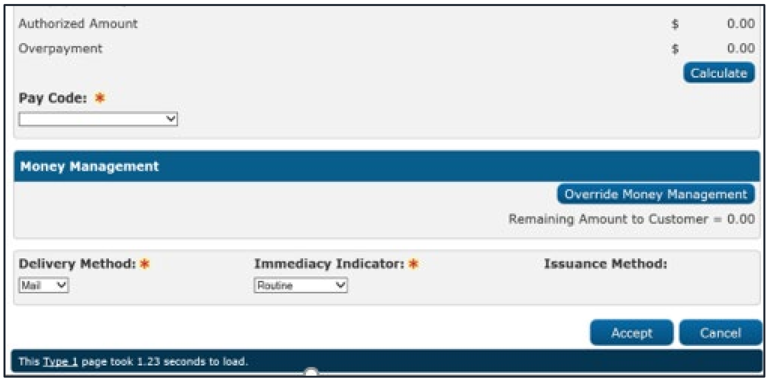


Figure 2.17.2.2 – Money Management Section

2.17.3 Description of Changes

1. Add "General Assistance (Managed) EDBC (Manual)" page which will be the manual EBDC page repurposed for GA (Managed) program. This page will include the following fields:
   a. Potential Benefit - An editable money field that is used in determining the authorized amount and overpayment. This is generally the final benefit amount minus any penalties.
      i. This field will be pre-populated as 0.00.
      ii. The standard money validation field will apply to this field
   b. Previous Potential Benefit - An editable money field that represents the amount already paid.
      i. This field will initially be populated with an amount that represents the total issuances for the same program and benefit month that the issuance has not been cancelled. This field will also factor in GM recovery account transactions for the same program and benefit month.
      ii. This field will be constrained to be a non-negative value.
      iii. The standard money validation field will apply to this field
   c. Overpayment Adjustment Amount - A calculated field that represents a benefit reduction due to any open recovery accounts.
      i. This field will initially be populated with 0.00.
   d. Authorized Amount - A static field that represents the total benefit amount that the EDBC authorizes to be paid to the payee.
      i. This will be pre-populated with a value based on the default values for the fields displayed and updated when the user clicks the Calculate button.

   e. Overpayment - A static field that represents the amount that was previously overpaid to the payee through this program.
      i. This will be pre-populated with a value based on the default values for the fields displayed and updated when the user clicks the Calculate button.
   f. Calculate Button - When clicked causes the calculated fields to be updated based on the user entered data as described below;
   g. Immediacy indicator - A drop down that contains Routine, Rush and Manual.
   h. Delivery Method – A drop down that contains the method by which the resulting payment is to be delivered with the option Mail or Pickup.
   i. Issuance Method – A static field which will show the issuance method as of the EDBC processing date.
   j. Pay Code - A required Drop down field from which user must select the value. The values will be the pay code description and it will be populated based on County option.
2. There will be a Money Management section set after the Aid Payment. This section will allow the user to add new money management records to the GA (Managed) EDBC (Manual) page. This section will include the following fields:
   a. 'Override Money Management' button – When clicked will lead to a new 'Money Management' page.
   b. Remaining Amount to Customer – This is a static field that shows the total benefit amount authorized by the EDBC minus the vendor payments added that will be paid to the payee.
3. The Money Management section will only display if there is an existing money management record present for the benefit month.
4. Add the following hard page validations so the "General Assistance (Managed) EDBC (Manual)" cannot be accepted:
   a. If any editable field has been modified since the Calculate button was last clicked: "EDBC must be recalculated before Accepting new changes. Click the Calculate button to update the EDBC."
   b. If the program status is Pending: "The program status must be active to save this EDBC. Please set the program status to active."
   c. If the Authorized amount exceeds the Issuance Threshold and the user does not have appropriate security rights: "The authorization amount of your issuance exceeds the county limit. Please correct the EDBC authorization amount or see your supervisor for assistance."

d. If the program status is Active and a member who is open does not have the claim code set: “At least one active member is missing one or more of the following: Claim Code.”

e. If the program status is Active and a member who is open does not have the Adult/Child code set: “At least one active member is missing one or more of the following: Adult/Child Code.”

f. If the program status is Active and a Member is open and does not have a aid code set: “An aid is required to save the Manual EDBC detail page. Please go to the program configuration override page to set the aid code.”

g. If the program status is Discontinued and there is a non-zero overpayment amount: “An EDBC with an overpayment amount cannot be saved with a status of 'Discontinued'.”

h. If the Immediacy is set to Manually Issued and the issuances would be skipped: “EDBC could not be accepted because a Manual Issuance could not be created for the following reason: <skip reason>.”

i. If the Immediacy is set to Rush and the issuances would be skipped: “EDBC could not be accepted because a Rush Issuance could not be created for the following reason: <skip reason>.”

j. If the Immediacy is set to Rush and the Begin Date of the EDBC is after the current month: “Unable to rush future month benefits.”

2.17.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Manual EDBC > General Assistance (Managed) EDBC (Manual)**

2.17.5 Page Mapping

N/A

2.17.6 Page Usage/Data Volume Impacts

N/A

2.18 Update Program Configuration Detail

2.18.1 Overview

Update Program Configuration Detail page to show ‘Other’ in the Claiming Code drop-down list for GA (Managed) program aid codes.

These aid codes are shared between LA County General Assistance/General Relief and C-IV General Assistance (Managed) since both General Assistance program uses the same aid codes and descriptions. In the backend each solution uses their own sperate program code so that it does not affect each other.

CalSAWS will translate the aid codes for General Assistance (Managed) to 9G and report the same to MEDS. This change will be added to CalSAWS system as part of 21.01 release with CA-215681.

2.18.2 Description of Changes

1. Only show ‘Other’ in the Claiming Code drop-down list for GA (Managed) program aid code:
   a. 90 - GA General Relief Independent Living-CNTY
   b. 91 - GA General Relief-B/C Non-Independent Living-CNTY
   c. 92 - GA General Relief-R/B Non-Independent Living-CNTY

2.18.3 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Manual Edbc > General Assistance (Managed) EDBC (Manual) > Program Configuration List > Program Configuration Detail**

2.18.4 Security Updates

N/A

2.18.5 Page Mapping

N/A

2.18.6 Page Usage/Data Volume Impacts

N/A

2.19 Enable the Money Management

2.19.1 Overview

Enable the 'Money Management' page to the CalSAWS System. This page will be populated when clicking on the 'Override Money Management' button located above the 'Remaining Amount to Customer' field.

2.19.2 Money Management Mockup

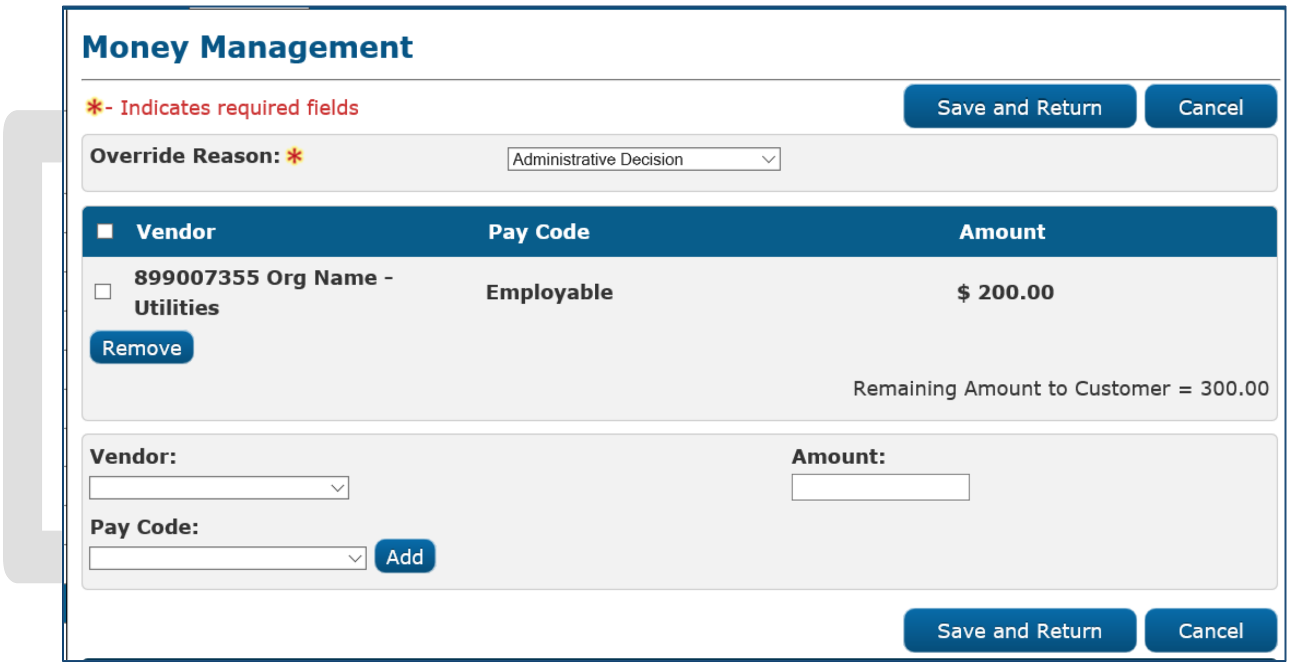


Figure 2.19.2.1 The Money Management page that will populate when clicking on the 'Override Money Management' button.

2.19.3 Description of Changes

1. Money Management page will allow the user to create Money management records and can be added to the GA (Managed) EDBC (Manual) page. This page will contain the fields:
   a. Override Reason – a dropdown field that contains (CT325 EDBC Override Reason Codes) – The reason why the money management configuration was overridden.
   b. Vendor – a dropdown field that contains existing Vendors established in the Money Management Data Collection page set for the case.
   c. Pay Code – a dropdown field that holds the existing Pay Code (CT623 Pay Code) set specifically for county for the program

code 'GM' reference CA-201377 DDCR 10002 GAGR Solution for C-IV Counties PayCode.xlsx for the county pay codes.
    d. Amount – A static money field that represents the amount.
    e. Add button – a button which takes the user inputs and saved as shown in figure 2.2.1.
    f. Remove button – a button that will appear only when an entry is added by the user. This button will remove the entry that was added by the user and indicated by a checked box.
2. Add the following hard page validations so the "Money Management" page cannot be accepted when the add button is clicked:
    a. If the vendor payment amount is blank: "Amount - Please enter a vendor payment amount."
    b. If the vendor is not picked: "Vendor - Please select a vendor."
3. Add the following hard page validations so the "Money Management" page cannot be accepted when the save and return button is clicked:
    a. If the Override Reason field is not chosen: "Override Reason - Field is required. Please enter a value."
    b. If the vendor payment is larger than the authorized amount: "Vendor Payments - The total amount of vendor payments cannot exceed the authorized amount."

2.19.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Manual EDBC > Override Money Management**

2.19.5 Page Mapping

N/A

2.19.6 Page Usage/Data Volume Impacts

N/A

2.20 Allow Multi-Month Manual EDBC

2.20.1 Overview

In LRS users have the capability of running multi month manual EDBC. This functionality will be updated to include General Assistance (Managed).

This functionality will be updated in CalSAWS to include General Assistance (Managed). Users can run manual EDBC for a month. Once it is accepted users will be provided with an option to generate a manual EBDC program for up to 5 months from the begin month.

Once the desired end month is selected a "not accepted" manual EDBC will be generated for the requested months. Users will have to enter the desired authorization amount for each EDBC generated and accept the EDBC before accepting and saving the results.

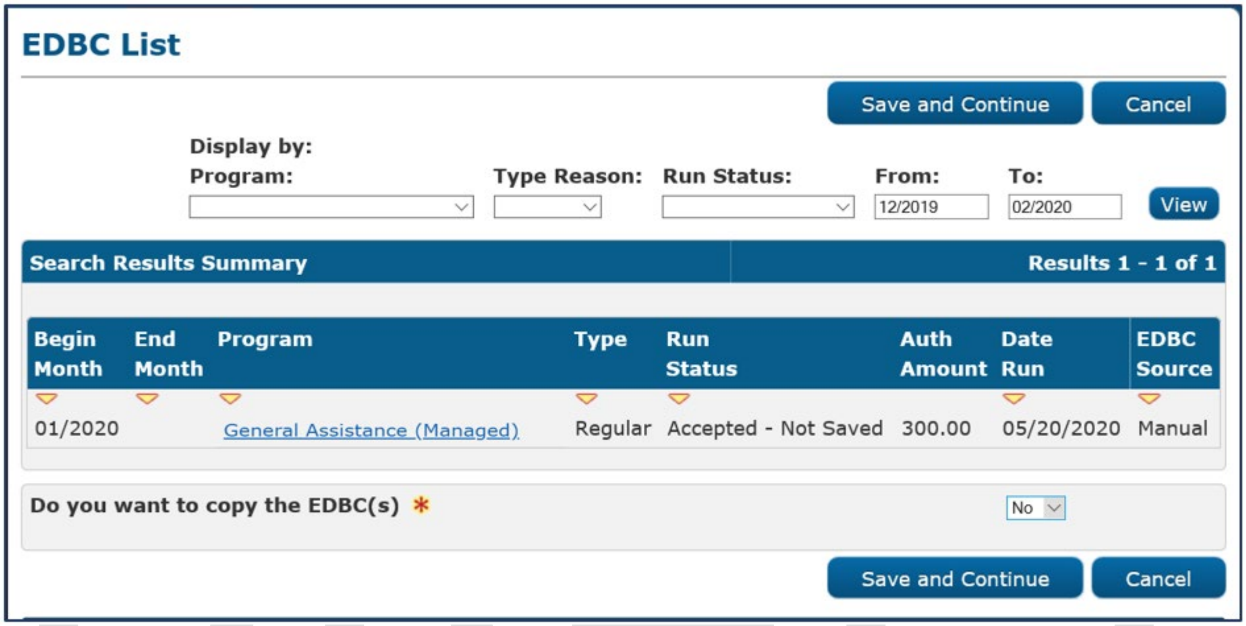


Figure 2.19.1.1 – The "Do you want to copy the EDBC(s)" option will appear.

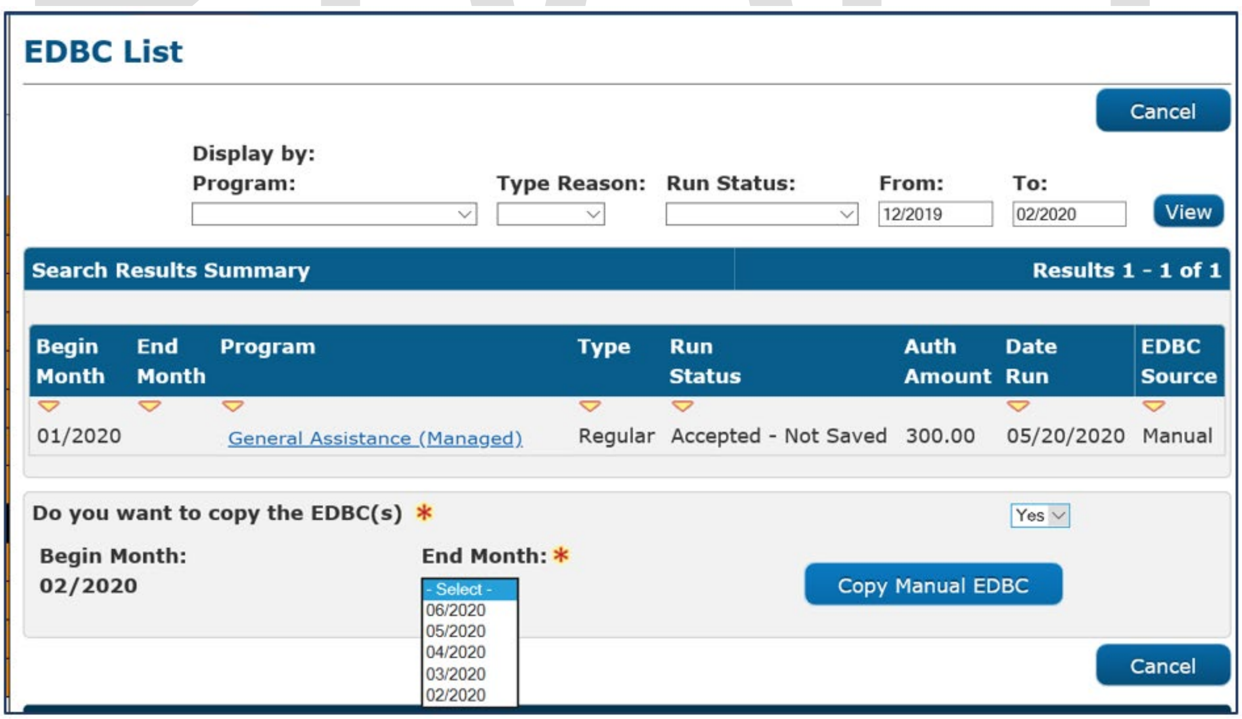
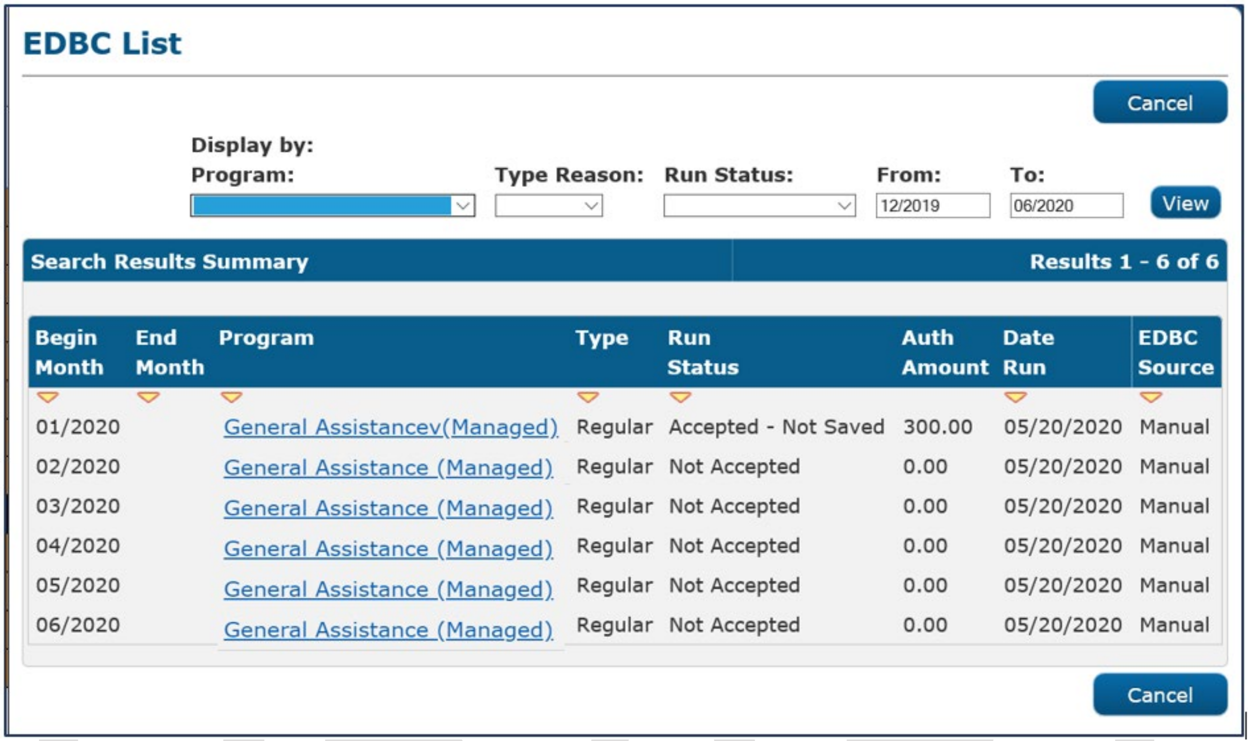


Figure 2.19.1.2 – Indicating Yes, the Begin Month will be the following month and the user can choose the desired End Month.



EDBC List

Cancel

Display by:

Program: | Type Reason: | Run Status: | From: 12/2019 | To: 06/2020 | View

Search Results Summary — Results 1 - 6 of 6

Begin Month	End Month	Program	Type	Run Status	Auth Amount	Date Run	EDBC Source
01/2020		General Assistancev(Managed)	Regular	Accepted - Not Saved	300.00	05/20/2020	Manual
02/2020		General Assistance (Managed)	Regular	Not Accepted	0.00	05/20/2020	Manual
03/2020		General Assistance (Managed)	Regular	Not Accepted	0.00	05/20/2020	Manual
04/2020		General Assistance (Managed)	Regular	Not Accepted	0.00	05/20/2020	Manual
05/2020		General Assistance (Managed)	Regular	Not Accepted	0.00	05/20/2020	Manual
06/2020		General Assistance (Managed)	Regular	Not Accepted	0.00	05/20/2020	Manual

Cancel

Figure 2.19.1.3 – By clicking “Copy Manual EDBC” Button it will generate the following “Not Accepted” EDBC for that program.

2.21 Eligibility - Update Code table to include General Assistance (Managed)

2.21.1 Overview

Update the code table to enable General Assistance (Managed).

2.21.2 Description of Changes

1. Add three new columns in the code table (CT 73 Program Reason Codes) and set the indicated status reasons in the table reference in the appendix A to allow them to be used to close the program in a GA (Managed) manual EDBC.
   a. The three new columns will be used to reference:
      i. GM Close Program reason
      ii. GM Close Person reason
      iii. General Assistance (Managed)
2. Add a new column named 'GM' for Program Statuses (CT 72) and set the indicator as in table to allow GA (Managed) manual EDBC to have the following statuses.

Status	GM
Pending	Y
Ineligible	Y
Discontinued	Y
Active	Y
Denied	Y

3. Add a new status reason "General Assistance program not Available for County" for the GA (Managed) program. This status reason will be a program closure.

Column	Entry
Code_num_identif	A9
Catgry_ID	73
Short_Decode_name	General Assistance program not Available for County

Set by Eligibility	Y
GM Close Program	Y
General Assistance (Managed)	Y

4. Create a new column named 'GM' for Program Person Roles in the code table (CT 201) to show as the role for the GA (Managed) program person:

Role	GM
Unaided Person	Y
Family Size Only	N
Member	Y
Financially Responsible - Included	N
Medi-Cal Member Only	N
Financially Responsible - Excluded	N

5. Use the existing C-IV second program reference column for the following Aid Codes (CT 184) to be available for the GA (Managed) program:

Column	Description	90	91	92
Short Decode	Short Textual description used for display	90 - GA General Relief Independent Living-CNTY	91 - GA General Relief-B/C Non-Independent Living-CNTY	92 - GA General Relief-R/B Non-Independent Living-CNTY
Long Decode	Long Textual description used for display	90 - General Assistance	91 - General Assistance	92 - General Assistance
Second C-IV Program	Internal system identifier for an additional Program which can use this Aid Code	GM	GM	GM

2.22 Issuance Threshold Updates

2.22.1 Overview

Issuance thresholds are established to determine the amount of benefits or service payments that can be approved by an Eligibility worker without requiring a supervisor override. This update is to default the values of

County Benefit Issuance Threshold for General Assistance (Managed) to maintain current functionalities for C-IV counties.

2.22.2 Description of Change

1. Update CTCR based on the 'GM Program Reference' sheet of the 'CA-201377 Auth Lvl and Benefit Threshold For GM.xlsx.
2. Perform data change to the 'EDBC Thrshold' and 'ServiceThrehsold' sheets of the 'CA-201377 Auth Lvl and Benefit Threshold For GM.xlsx.

2.22.3 Estimated Number of Records Impacted/Performance

Approximately 78 records.

2.23 Payment/Valuable Request Authorization Updates

2.23.1 Overview

Payment/Valuable Request Authorization allows each county to administer and manage the required authorization level for each program. This update is to make Payment/Valuable Requests require 1st Level Authorization for General Assistance (Managed) for C-IV counties.

2.23.2 Description of Change

Perform data changes to the 'Fiscal Authorization' sheet of the 'CA-201377 Auth Lvl and Benefit Threshold For GM.xlsx'.

2.23.3 Estimated Number of Records Impacted/Performance

Approximately 39 records.

2.24 Update GA (Managed) Pay Codes for Humboldt County

2.24.1 Overview

Humboldt County has requested to update Pay Codes for the GM program. Below describe the required changes.

2.24.2 Description of Change

Enable the following GA (Managed) Pay Codes for Humboldt County:
a) 8D - Homeless
b) 8O – Employment Services

Disable the following GA (Managed) Pay Codes for Humboldt County:

a) 8E – CAPI Pending
b) 8G – Drug and Alcohol Services
c) 8L – Work Exempt

2.24.3 Estimated Number of Records Impacted/Performance

Approximately 5 records.

2.25 Update Fund Code Map for Humboldt County

2.25.1 Overview

Below describe the required Fund Code updates for Humboldt County for enabled Pay Codes in this SCR.

2.25.2 Description of Change

Insert new Fund Codes based on the 'SCR_CA_201377_Fund_Code_Mapping.xlsx' file.

2.25.3 Estimated Number of Records Impacted/Performance

Approximately 2 records.

2.26 Update the Need Detail

2.26.1 Overview

Update the Need Detail page to include need types for GA (Managed) program for participants/benefactors associated to the case.

2.26.2 Description of Changes

1. Add two additional Customer Need Type in the code table Customer Need Type (CT 164):

Code Number	Short Description	Long Description
GA	GA Incidentals	GA Incidentals
GO	GA Other	GA Other

2. Add the following mapping for Customer Need Category and Customer Need type for GA (Managed) program to the code table

Customer Need to Program mapping (CT 1870). Reference CA-201377 DDCR 10002 GAGR Solution for C-IV Counties Customer Need Program Mapping.xlsx for the Customer Need type, Customer Need Category and program mapping.

2.26.3 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Need**

2.26.4 Security Updates

N/A

2.26.5 Page Mapping

N/A

2.26.6 Page Usage/Data Volume Impacts

N/A

2.27 Update Service Arrangement Detail

2.27.1 Overview

Update the Service Arrangement page to include a new validation for GA (Managed) program.

2.27.2 Service Arrangement Detail Mockup

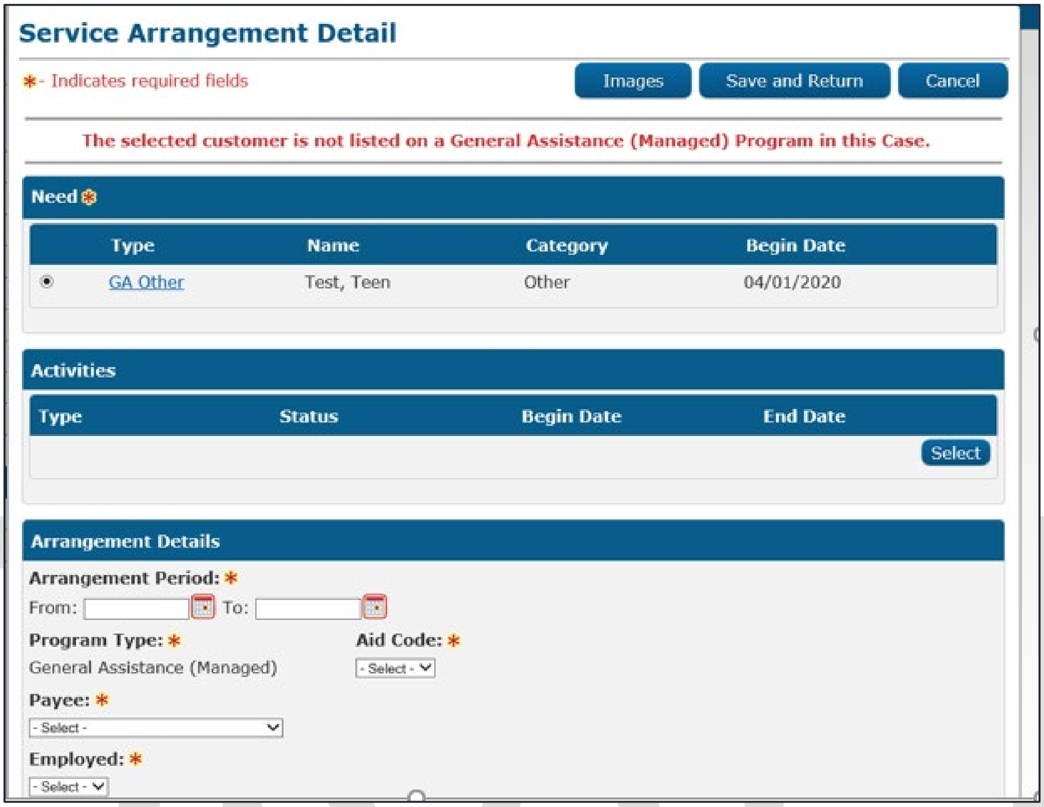


Figure 2.24.2.1 Service Arrangement Detail with the Validation

2.27.3 Description of Changes

1. Update Service Arrangement Detail page to trigger validation, "The selected customer is not listed on a GA (Managed) Program in this Case" when all these conditions are met:
    a. The GA (Managed) program is changed on the Program Type drop down list.
    b. The selected customer is not listed on the GA (Managed) program.

2.27.4 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Service Arrangements > Service Arrangement ID link**

2.27.5 Security Updates

N/A

2.27.6 Page Mapping

N/A

2.27.7 Page Usage/Data Volume Impacts

N/A

2.28 Update Valuable Request Detail

2.28.1 Overview

Update the Valuable Request Detail page to show only the GA (Managed) Pay Codes in the Pay Code field drop down if the Valuable Request is created for the GA (Managed) Program.

2.28.2 Page Location

- **Global: Eligibility**
- **Local: Customer Information**
- **Task: Service Arrangements > Service Arrangement ID > Create Valuable Request**

2.28.3 Security Updates

N/A

2.28.4 Page Mapping

N/A

2.28.5 Page Usage/Data Volume Impacts

N/A

2.29 Update Un-Reimbursed Assistance Pool Detail

2.29.1 Overview

Currently this page is not used in LRS. This page will be ported over from the existing Un-Reimbursed Assistance Pool Detail page from the C-IV system to LRS.

2.29.2 Description of Changes

1. Update Un-Reimbursed Assistance Pool Detail page to include General Assistance (Managed) in the Program dropdown field.
2. Add the following aid codes for the aid code dropdown list for the program GM:
    a. 90 – GA General Relief Independent Living – CNTY
    b. 91 – GA General Relief – B/C Non-Independent Living – CNTY
    c. 92 – GA General Relief – R/B Non-Independent Living - CNTY

2.29.3 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: Issuance History > Process UAP button**

2.29.4 Security Updates

N/A

2.29.5 Page Mapping

N/A

2.29.6 Page Usage/Data Volume Impacts

N/A

2.30 Update Issuance Detail

2.30.1 Overview

Update the Issuance Detail page to make the Pay Code field required when the program is "General Assistance (Managed)".

Update the page to send an EBT Benefit Type of "GA" via host to host when rushing a "GA (Managed)" issuance.

2.30.2 Page Location

- **Global: Case Info**
- **Local: Case Information**
- **Task: Issuance History > Issuance Detail**

2.30.3 Security Updates

N/A

2.30.4 Page Mapping

N/A

2.30.5 Page Usage/Data Volume Impacts

N/A

2.31 EBT Repayment Detail

2.31.1 Overview

Update the EBT Repayment page to include GA (Managed) program.

2.31.2 Page Location

- **Global: Eligibility**
- **Local: Case Summary**
- **Task: EBT Account List > EBT Repayment List**

2.31.3 Security Updates

N/A

2.31.4 Page Mapping

N/A

2.31.5 Page Usage/Data Volume Impacts

N/A

2.32 Update the Recovery Account Detail Page

2.32.1 Overview

Populate the values under the "Reason" and "Cause" drop-down field when General Assistance/General Relief or General Assistance (Managed) is the selected "Program Type".

2.32.2 Description of Changes

1. Populate the "Reason" values when creating a General Assistance/General Relief program or General Relief (Managed) program Recovery Account on the Recovery Account Detail page
    a) Aid Paid Pending - State Hearing

b) Bounce Check Charge
c) Collection Fee
d) Court Fees
e) Electronic Theft
f) General Assistance / General Relief
g) Sheriffs Service Fee
h) Unreported Income – Other

2. Populate the "Cause" values when creating a General Assistance/General Relief program or General Relief (Managed) program Recovery Account on the Recovery Account Detail page
   a) Bounce Check Charges
   b) Cash - Admin Caused
   c) Cash - Customer Caused
   d) Cash - Late QR7
   e) Cash - Late SAR7
   f) Cash - Potential IPV
   g) Collection Fee
   h) Court Filing Fees
   i) Sheriff Service Fees

3. Make the following updates to the code hierarchy for (CT 18)
Please Note: For the parent Id for GM it will be determine by the Id number in category 18 that corresponds with (GM).

Parent Category	Parent ID	Parent description	Child ID	Child description
18	Determine by GM Id in CT 18	General Assistance (Managed)	8609	Cash - Admin Caused
18		General Assistance (Managed)	8610	Cash - Customer Caused
18		General Assistance (Managed)	41072	Cash - Late QR7
18		General Assistance (Managed)	57465	Cash - Late SAR7
18		General Assistance (Managed)	8611	Cash - Potential IPV
18		General Assistance (Managed)	17092	Collection Fee
18		General Assistance (Managed)	8636	Court Filing Fees

18		General Assistance (Managed)	8637	Sheriff Service Fees
18		General Assistance (Managed)	8638	Bounce Check Charges

2.32.3 Page Location

- **Global: Fiscal**
- **Local: Collections**
- **Task: Create External Recovery Account**

2.32.4 Security Updates

N/A

2.32.5 Page Mapping

N/A

2.32.6 Page Usage/Data Volume Impacts

N/A

2.33 Payment Request Detail

2.33.1 Overview

Update the payment request detail page to allow EBT issuance for the GA (Managed) program.

2.33.2 Description of Changes

1. Allow EBT as an Issuance Method on the Payment Request Detail page for the GA (Managed) when these conditions are met:
    a) The Issuance Method is EBT.
    b) The program payee and the payee on the Service Arrangement Detail page are same.
2. In all other scenarios the Issuance Method for the GA (Managed) program will be defaulted to 'Warrant' without EBT as an option.
3. Allow GA (Managed) issuances to be issued as EBT, Warrant and Direct Deposit.

a) Add a new reference column 'GM' in the code table Issuance Type (CT 112).

b) Indicate the following issuances in the code detail table Issuances type (CT 112) to be applicable for reference column 'GM':

i) EBT.

ii) Warrant.

iii) Direct Deposit.

4. Update the Payment Request Detail page to show only the GA Pay Codes in the Pay Code field drop down if:

    a) the Payment Request is created for the GA (Managed) Program.

5. Add a hard validation if the program is GA (Managed) and there is no pay code selected.

    a) 'Pay Code – Please select a pay code'.

6. Allow a GA (Managed) program Payment Request to be approved only if the GA (Managed) program is:

    a) Active for the Service Month indicated on the Payment Request

7. If the Approve button is selected and the GA (Managed) program status is not active for the indicated service month, display the following validation message: "The General Assistance (Managed) Payment cannot be issued unless the program is active during the service month."

8. All the Payment Requests for the GA (Managed) Program will be issued as Service Payments.

2.33.3 Page Location

- **Global: Fiscal**
- **Local: Payment Request**
- **Task: Payment Request Search**

2.33.4 Security Updates

N/A

2.33.5 Page Mapping

N/A

2.33.6 Page Usage/Data Volume Impacts

N/A

2.34 Issuance Method Detail

2.34.1 Overview

Update the Issuance Method Detail to populate the following status reasons for GA (Managed) issuances.

2.34.2 Description of Changes

1. Add a new reference column 'GM' in the code table Issuance Method Status Reason (CT 10110).
2. Indicate the following Issuance Method Status Reason in the code detail table (CT 10110) to be applicable for reference column 'GM':
    a) Direct Deposit - Start
    b) Direct Deposit - Stop (Customer Request)
    c) Direct Deposit - Stop (Bank Account Closed)
    d) Bank Account Closed
    e) Client is Aged
    f) Client Lives Outside County
    g) Client in Public Housing
    h) Client is Incapacitated
    i) Client Has Limited Access
    j) Client Request
    k) Client Lives Out of State
    l) Eviction Threat/Lndlord Hrdshp
    m) EBT Host-to-Host Successful
    n) EBT Host-to-Host Failure

2.34.3 Page Location

- **Global: Case Info**
- **Local: Case summary**
- **Task: Program View Detail > Issuance Method**

2.34.4 Security Updates

N/A

2.34.5 Page Mapping

N/A

2.34.6 Page Usage/Data Volume Impacts

N/A

2.35 Update Expungement Detail

2.35.1 Overview

Update the Expungement detail page for GA (Managed) program.

2.35.2 Expungement Detail Mockup

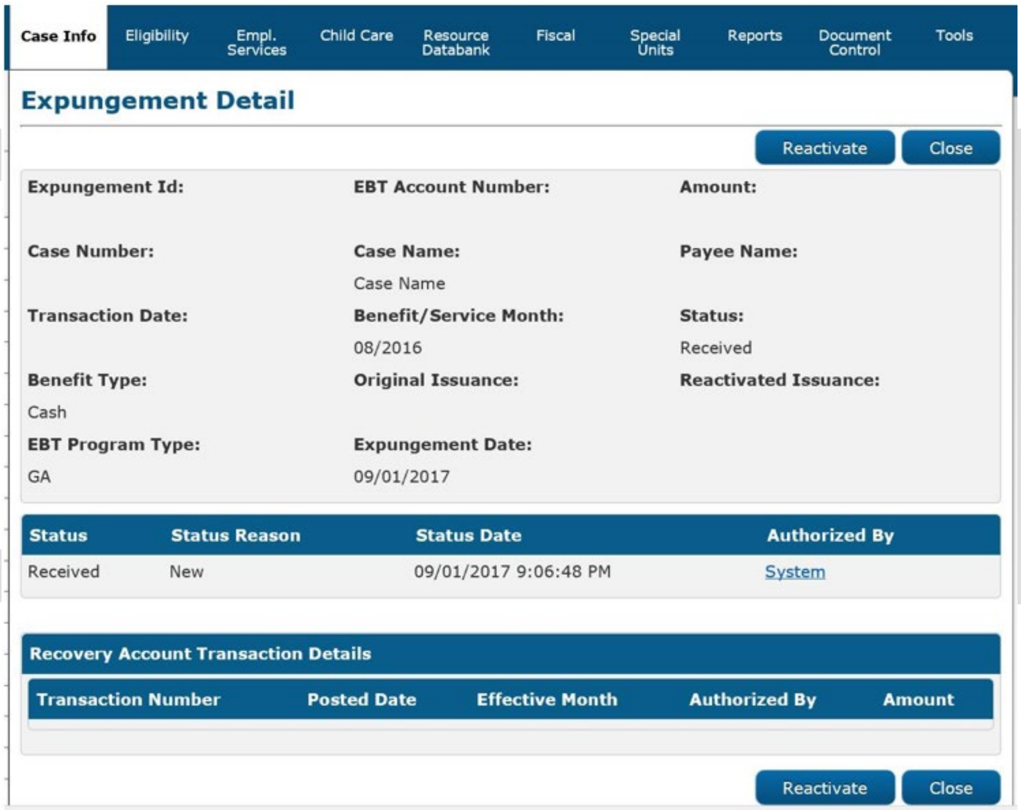


Figure 2.31.2.1 Expungement Detail with the Reactivate Button.

2.35.3 Description of Changes

1. Display a "Reactivate" button to the left of the "Close" button on the "Expungement Detail" page, only when all the following conditions are met:
    a. The Expunged Benefit Type is "General Assistance".
    b. The County is a C-IV opted-in GA (Managed) county.
    c. The Expungement Status is "Received".
    d. The latest EBT Cash Account Type on the case is "Active".

    e. The user has the "Expungement Reactivate" security group.

2. When the "Reactivate" button is clicked, update the status of the General Assistance expungement to "Pending Reactivation" so that the nightly batch issuance process will reactivate and create a reactivated issuance for this expungement.
    a. After the status has been updated, reload the Expungement Detail page with the updated status information. NOTE: The "Reactivate" button will not show after the page reloads since the status will be "Pending Reactivation".

2.35.4 Page Location

- **Global: Fiscal**
- **Local: Expungements**
- **Task: Expungement Search > Search > Expungement ID**

2.35.5 Security Updates

N/A

2.35.6 Page Mapping

N/A

2.35.7 Page Usage/Data Volume Impacts

N/A

2.36 Update Fiscal logic

2.36.1 Overview

Update the GA (Managed) program to follow the staggering logic already set.

2.36.2 Description of Changes

1. Stagger the Available Date for all General Assistance (Managed) Main Payroll EBT issuances (unless there is a Staggered Issuance Exemption for this program) over the first three days following the same Cash EBT Stagger Date logic as CalWORKs.

2.37 Update the skip issuance logic

2.37.1 Overview

Issuance Batch is responsible for creating an Issuance record for each authorization that is subject to be paid on a Monthly/Nightly basis. This update is to configure the Issuance Batch to process authorizations for 'General Assistance (Managed)' program.

2.37.2 Description of Changes

1. Update the Skip Issuance logic in the Issuance Batch to apply the following skip issuance reasons to the EDBC authorizations associated to 'General Assistance (Managed)' program:
    a. Future Month Issuance Cannot be Created Before Last Business Day.
    b. Payee Mailing Address Cannot be Determined.

2.38 Update Benefit Issuance Pre-Claiming (PBXXF201)

2.38.1 Overview

Update the Benefit Issuance Pre-Claiming to include the GA (Managed) program to identify issuances for claiming where the status is updated to Issued, Manually Issued, or Canceled between the Last Success Date and Batch Date.

2.38.2 Description of Changes

Update the Benefit Issuance Pre-Claiming module to include all GA (Managed) issuances that are Issued, Manually Issued, or Canceled between the Last Success Date and Batch Date.

Update the Benefit Issuance Adjustment Pre-Claiming module to include all Accepted and Saved recalculated EDBCs for GA (Managed) that are run between the Last Success date and Batch Date.

Update the Benefit Issuance Expungement Pre-Claiming module to include all expungements for GA (Managed) received between the Last Success date and Batch Date.

2.39 Update Benefit Issuance Claiming (PBXXF204)

2.39.1 Overview

Update the Benefit Issuance Claiming to include the GA (Managed) program. This will be done by migrating the C-IV General Assistance Managed Claiming logic into CalSAWS.

2.39.2 Description of Changes

Update the Benefit Issuance and Benefit Issuance Adjustment modules to calculate the following data points for GA (Managed) issuances. All calculations will be based on the EDBC that authorized the GA (Managed) issuance for Benefit Issuance claiming or the latest Accepted and Saved Recalculated EDBC in the benefit month for Benefit Issuance Adjustment claiming.

Federal Adult Count – The field will be 0.

Federal Child Count – This field will be 0.

Federal Amount – This field will be $0.

Non-Federal Adult Count – This field will be 0.

Non-Federal Child Count – This field will be 0.

Non-Federal Amount – This field will be $0.

Other Adult Count – This field will be the sum of all Active Adults in the program with a Role Code of Member and Claiming Code is 'Other'. The value will be 0 if the Other Adult Count is already claimed in another GA (Managed) issuance for the same program and benefit month. This will be an unduplicated count.

Other Child Count – This field will be the sum of all Active Children in the program with a Role Code of Member and Claiming Code is 'Other'. The value will be 0 if the Other Child Count is already claimed in another GA (Managed) issuance for the same program and benefit month. This will be an unduplicated count.

Other Amount – This field will be the Issuance Amount.

Update the Issuance Expungement Claiming Batch Module to claim the expungement amount as a negative transaction using the following rules:

Other Amount – This field will be the Expungement Amount.

Non-Federal Amount – This field will be $0.

Federal Amount – This field will be $0.

2.40 Update Service Payment Issuance Claiming (PBXXF203)

2.40.1 Overview

Update the Service Payment Issuance Claiming to include the GA (Managed) program.

2.40.2 Description of Changes

Update the Service Payment Issuance and Service Payment Adjustment modules to claim the General Assistance (Managed) Program Payment Requests with zero person counts.

Federal Adult Count – The field will be 0.

Federal Child Count – This field will be 0.

Non-Federal Adult Count – This field will be 0.

Non-Federal Child Count – This field will be 0.

Other Adult Count – This field will be 0.

Other Child Count – This field will be 0.

Update the Service Payment Issuance and Service Payment Adjustment modules to claim the payment amount using the following rules:

Federal Amount – This field will be $0.

Non-Federal Amount – This field will be $0.

Other Amount – This field will be the Issuance Amount.

2.41 Update Valuables Claiming (PBXXR202)

2.41.1 Overview

Update the Valuables Claiming to include the GA (Managed) program.

2.41.2 Description of Changes

Update the Valuables Issuance and Valuables Adjustment modules to claim the General Assistance (Managed) Program Valuable Requests with zero person counts.

Federal Adult Count – The field will be 0.

Federal Child Count – This field will be 0.

Non-Federal Adult Count – This field will be 0.

Non-Federal Child Count – This field will be 0.

Other Adult Count – This field will be 0.

Other Child Count – This field will be 0.

Update the Valuables Issuance and Valuables Adjustment modules to claim the valuable amount using the following rules:

Federal Amount – This field will be $0.

Non-Federal Amount – This field will be $0.

Other Amount – This field will be the Valuable Amount.

2.42 Update Non-Foster Care Main Payroll Sweep (PB00F300)

2.42.1 Overview

Include GA (Managed) program to this sweep which identifies any high dated EDBCs where an issuance has not been created for the upcoming month.

2.42.2 Description of Change

Update Non-Foster Care Main Payroll Sweep (PB00F300) to include the GA (Managed) program.

2.42.3 Execution Frequency

No changes to the current execution Frequency.

2.42.4 Key Scheduling Dependencies

No changes to the current scheduling dependencies.

2.42.5 Counties Impacted

All counties in CalSAWS system that opted in GA (Managed)

2.42.6 Data Volume/Performance

No measurable change to the volume or performance.

2.42.7 Failure Procedure/Operational Instructions

No change to the current failure procedures and operational instructions.

2.43 Update Recovery Account Claiming (PBXXR203)

2.43.1 Overview

Update the Recovery Account Claiming to include the GA (Managed) program.

2.43.2 Description of Changes

Update Recovery account claiming module to claim the GA (Managed) recovery account transaction amounts and regular GM recovery accounts using the following rules:

Other Amount – This field will be the total recovery account transaction amount.

Non-Federal Amount – This field will be $0.

Federal Amount – This field will be $0.

The following recovery account transactions will be in the scope for GA (Managed) reference Appendix D.

2.44 Update Future Monthly Supplemental sweep (PB00F326)

2.44.1 Overview

Update existing Future Monthly Supplemental sweep (PB00F326) to include the GA (Managed) program.

2.44.2 Description of Change

Update sweep (PB00F326) to identifies GA (Managed) EDBCs that are effective for the upcoming month where an issuance has not been created yet.

2.44.3 Execution Frequency

No changes to the current scheduling dependencies.

2.44.4 Key Scheduling Dependencies

N/A

2.44.5 Counties Impacted

All counties currently in the CalSAWS that opted in GA Managed

2.44.6 Data Volume/Performance

No measurable change to the volume or performance.

2.44.7 Failure Procedure/Operational Instructions

No change to the current failure procedures and operational instructions.

2.45 Update Nightly EDBC Issuance sweep (PB00F302)

2.45.1 Overview

Update existing Nightly EDBC Issuance sweep (PB00F302) to include the GA (Managed) program.

2.45.2 Description of Change

Update this sweep to identify any high dated GA (Managed) EDBCs where an issuance has not been created for the current month.

2.45.3 Execution Frequency

No changes to the current execution frequency.

2.45.4 Key Scheduling Dependencies

No changes to the current scheduling dependencies.

2.45.5 Counties Impacted

All counties that is in the CalSAWS system that opted in GA (Managed)

2.45.6 Data Volume/Performance

No measurable change to the volume or performance.

2.45.7 Failure Procedure/Operational Instructions

No change to the current failure procedures and operational instructions.

2.46 Update Nightly EDBC Non-FC Issuance sweep (PB00F303)

2.46.1 Overview

Update existing Nightly EDBC Non-FC Issuance sweep (PB00F303) to include the GA (Managed) program.

2.46.2 Description of Change

This sweep identifies any recalculated EDBCs where an issuance has not been created yet and the EDBC was run in the last six months.

2.46.3 Execution Frequency

No changes to the current execution frequency.

2.46.4 Key Scheduling Dependencies

No changes to the current scheduling dependencies.

2.46.5 Counties Impacted

No counties should be impacted

2.46.6 Data Volume/Performance

No measurable change to the volume or performance.

2.46.7 Failure Procedure/Operational Instructions

No change to the current failure procedures and operational instructions.

2.47 Add New Forms in Template Repository

Existing GA forms in C-IV are being migrated into CalSAWS. The GA Free Format NOA was implemented in C-IV through CIV-104855 in the 20.01 release. All other forms were implemented in C-IV as part of CIV-4400 in the 20.07 release.

A system-wide flag is implemented per Recommendation 2.1. This flag determines whether the functionality added with this SCR will be visible in the system. As part of this, the forms added in the following recommendations will need to be hidden/displayed depending on the flag.

The forms will be using the CalSAWS Non-State form standard header (see below figure). Form numbers and titles wil be changed from the C-IV implementation to match new CalSAWS standards.

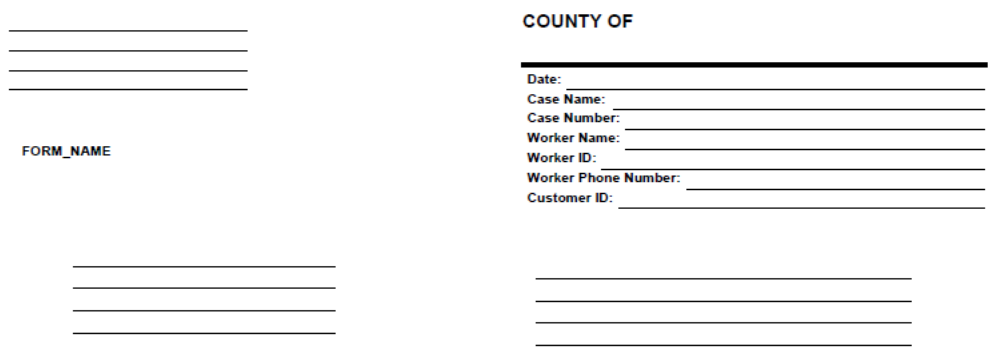


Figure 2.43.1 CalSAWS Non-State Form Standard Header

Note: The dynamic header that may be used by the Non-State forms will be implemented in CalSAWS through CA-214196 which may not exactly match the above image.

2.47.1 Add CSF 106 - Free Format General Assistance/General Relief NOA

2.47.1.1 Overview

This recommendation will add the GA/GR Free Form NOA to Template Repository.

State Form: N/A, this is a C-IV specific GA Form

Programs: General Assistance (Managed)

Attached Forms: GA/GR NA Back 9

Forms Category: NOA

Languages:

English

2.47.1.2 Create CSF 106 XDP

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Free Format Notice of Action
Form Number: CSF 106
Include NA Back 9: GA/GR NA Back 9

Form Mockups/Examples: See Supporting Documents #1 (English CSF 106 and GA/GR NA Back 9) and #9 (Spanish GA/GR NA Back 9)

2.47.1.3 Add CSF 106 to Template Repository

This Template will be added to the Template Repository in English only

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.1.4 Add CSF 106 Form Control

Add an Imaging Barcode for the GA/GR Free Format NOA.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.47.1.5 CSF 106 Print Options and Mailing Requirements

The print options checked below will be available for this form.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:

Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: None

Additional Requirements:

Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.47.1.6 GA/GR NA Back 9

On the back of the first page of all the NOAs, also known as the second page, the GA/GR NA Back 9 will generate. This GA/GR NA

Back 9 was created using existing GA NOAs from samples provided by several C-IV counties. The page number and page total will generate at the bottom of the page (see supporting document # 1 and 9 for mockup).

The 90 days fields and toll free/TDD phone numbers will be editable text boxes.

2.47.1.7 NA Back 9 Form Population

The NA Back 9 has pre-populated values that will be editable.

Pre-populated value	Description	Formatting	Template Repository Population	Populates with Form Generation
90	Number of days to ask for a hearing	Arial Font Size 10	Y	Y
1-800-952-5253	State Toll-free number	Arial Font Size 10 bold	Y	Y
1-800-952-8349	State TDD Number	Arial Font Size 10 bold	Y	Y
<County>	User's County	Arial Font Size 10 Underline	Y	Y

2.47.2 Add CSF 107 – GA/GR Approval NOA

2.47.2.1 Overview

This recommendation will add the CSF 107 GA/GR Approval NOA to Template Repository. There will be no variable population aside from the existing population logic for the CalSAWS Standard Header.

State Form: N/A, this is a C-IV specific GA Form

Programs: General Assistance (Managed)

Attached Forms: GA/GR NA BACK 9

Forms Category: NOA

Languages:

English and Spanish

2.47.2.2 Create CSF 107 – GA/GR Approval NOA XDP

A new XDP will be created for the GA/GR Approval NOA. This GA NOA will have the GA NOA BACK 9 on the back of the first page. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Approval
Form Number: CSF 107
Include NA Back 9: Yes, the GA/GR NA BACK 9
Form Mockups/Examples: See Supporting Documents #2 (English) and #10 (Spanish)

2.47.2.3 Add Form Control for CSF 107

Add an Imaging Barcode for the CSF 107.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.47.2.4 Add CSF 107 – GA/GR Approval NOA to Template Repository

Add the CSF 107 GA/GR Approval NOA to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.2.5 CSF 107 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 107 GA/GR Approval NOA.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:
Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.47.3 Add CSF 108 – GA/GR Denial NOA

2.47.3.1 Overview

This recommendation will add the CSF 108 GA/GR Denial NOA to Template Repository.

State Form: N/A, this is a C-IV specific GA Form
Programs: General Assistance (Managed)
Attached Forms: GA/GR NA BACK 9
Forms Category: NOA

Languages:
English and Spanish

2.47.3.2 Create CSF 108 – GA/GR Denial NOA XDP

A new XDP will be created for the GA/GR Denial NOA. This GA NOA will have the GA NOA BACK 9 that was added with the GA Free Format NOA. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Denial
Form Number: CSF 108
Include NA Back 9: Yes, the GA/GR NA BACK 9

Form Mockups/Examples: See Supporting Documents #3 (English) and #10 (Spanish)

2.47.3.3 Add Form Control for CSF 108

Add an Imaging Barcode for CSF 108.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.47.3.4 Add CSF 108 Denial NOA to Template Repository

Add the CSF 108 GA/GR Denial NOA to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.3.5 Add CSF 108 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 108 GA/GR Denial NOA.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:

Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.47.4 Add CSF 109 – GA/GR Discontinuance NOA

2.47.4.1 Overview

This recommendation will add the CSF 109 GA/GR Discontinuance NOA to Template Repository.

State Form: N/A, this is a C-IV specific GA Form
Programs: General Assistance (Managed)
Attached Forms: GA/GR NA BACK 9
Forms Category: NOA

Languages:

English and Spanish

2.47.4.2 Create CSF 109 – GA/GR Discontinuance NOA XDP

A new XDP will be created for the GA/GR Discontinuance NOA. This GA NOA will have the GA NOA BACK 9 that was added with the GA Free Format NOA. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Discontinuance
Form Number: CSF 109
Include NA Back 9: Yes, the GA/GR NA BACK 9
Form Mockups/Examples: See Supporting Documents #4 (English) and #10 (Spanish)

2.47.4.3 Add Form Control for CSF 109

Add an Imaging Barcode for CSF 109.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.47.4.4 Add CSF 109 Discontinuance NOA to Template Repository

Add the CSF 109 GA/GR Discontinuance NOA to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.4.5 Add CSF 109 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 109 GA/GR Discontinuance NOA.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:
Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.47.5 Add CSF 110 – GA/GR Benefit Change NOA

2.47.5.1 Overview

This recommendation will add the CSF 110 GA/GR Benefit Change NOA to Template Repository.

State Form: N/A, this is a C-IV specific GA Form
Programs: General Assistance (Managed)
Attached Forms: GA/GR NA BACK 9
Forms Category: NOA

Languages:

English and Spanish

2.47.5.2 Create CSF 110 – GA/GR Benefit Change NOA XDP

A new XDP will be created for the GA/GR Benefit Change NOA. This GA NOA will have the GA NOA BACK 9 that was added with the GA Free Forma NOA. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Benefit Change
Form Number: CSF 110
Include NA Back 9: Yes, the GA/GR NA BACK 9
Form Mockups/Examples: See Supporting Documents #5 (English) and #10 (Spanish)

2.47.5.3 Add Form Control for CSF 110

Add an Imaging Barcode for CSF 110.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.47.5.4 Add CSF 110 Benefit Change NOA to Template Repository

Add the CSF 110 GA/GR Benefit Change NOA to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.5.5 Add CSF 110 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 110 GA/GR Benefit Change NOA.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:
Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.47.6 Add CSF 111 – GA/GR Supplement NOA

2.47.6.1 Overview

This recommendation will add the CSF 111 GA/GR Supplement NOA to Template Repository.

State Form: N/A, this is a C-IV specific GA Form
Programs: General Assistance (Managed)
Attached Forms: GA/GR NA BACK 9
Forms Category: NOA

Languages:
English and Spanish

2.47.6.2 Create CSF 111 – GA/GR Supplement NOA XDP

A new XDP will be created for the GA/GR Supplement NOA. This GA NOA will have the GA NOA BACK 9 that was added with the GA Free Format NOA. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Supplement
Form Number: CSF 111
Include NA Back 9: Yes, the GA/GR NA BACK 9
Form Mockups/Examples: See Supporting Documents #6 (English) and #10 (Spanish)

2.47.6.3 Add Form Control for CSF 111

Add an Imaging Barcode for CSF 111.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	Yes

2.47.6.4 Add CSF 111 Supplement NOA to Template Repository

Add the CSF 111 GA/GR Supplement NOA to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.6.5 Add CSF 111 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 111 GA/GR Supplement NOA.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:
Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: N/A
Outgoing Envelope Type: Standard
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A

Enclosures: N/A
Electronic Signature: No

2.47.7 Add CSF 112 – GA/GR Periodic Report Form

2.47.7.1 Overview

This recommendation will add the CSF 112 GA/GR Periodic Report Form to Template Repository.

State Form: N/A, this is a C-IV specific GA Form
Programs: General Assistance (Managed)
Attached Forms: None
Forms Category: Forms

Languages:

English and Spanish

2.47.7.2 Create CSF 112 – GA/GR Periodic Report Form XDP

A new XDP will be created for the GA/GR Periodic Report Form. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header and Mailing Cover Sheet.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Periodic Report
Form Number: CSF 112
Include NA Back 9: No
Form Mockups/Examples: See Supporting Documents #7 (English) and #11 (Spanish)

2.47.7.3 Add Form Control for CSF 112

Add an Imaging and BRM Barcode for CSF 112.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	Yes	Yes

2.47.7.4 Add CSF 112 Periodic Report Form to Template Repository

Add the CSF 112 GA/GR Periodic Report Form to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.7.5 Add CSF 112 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 112 GA/GR Periodic Report Form. This form will use a Mailing Cover Sheet in order to provide a Mail-Back address.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:
Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: District Office Name and Address
Outgoing Envelope Type: Standard
Return Envelope Type: BRM

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.47.8 Add CSF 113 – GA/GR Reimbursement Agreement Form

2.47.8.1 Overview

This recommendation will add the CSF 113 GA/GR Reimbursement Agreement Form to Template Repository.

State Form: N/A, this is a C-IV specific GA Form
Programs: General Assistance (Managed)
Attached Forms: None
Forms Category: Forms

Languages:
English and Spanish

2.47.8.2 Create CSF 113 – GA/GR Reimbursement Agreement Form XDP

A new XDP will be created for the GA/GR Reimbursement Agreement Form. There will be no variable population aside from the existing population logic for the LRS/CalSAWS Standard Header and Mailing Cover Sheet.

Form Header: Existing LRS/CalSAWS Standard Header
Form Title: GA/GR Reimbursement Agreement
Form Number: CSF 113
Include NA Back 9: No

Form Mockups/Examples: See Supporting Documents #8 (English) and #12 (Spanish)

2.47.8.3 Add Form Control for CSF 113

Add an Imaging and BRM Barcode for CSF 113.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	Yes	Yes

2.47.8.4 Add CSF 113 Reimbursement Agreement Form to Template Repository

Add the CSF 113 GA/GR Reimbursement Agreement Form to the Template Repository.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.47.8.5 Add CSF 113 Form Print Options and Mailing Requirements

The following are the print and mailing requirements for the CSF 113 GA/GR Reimbursement Agreement Form. This form will use a Mailing Cover Sheet in order to provide a Mail-Back address.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Yes	Yes	Yes	Yes	Yes	Yes

Mailing Requirements:
Mail-To (Recipient): Person selected in the Document's Parameter page
Mailed From (Return): Standard Population
Mail-back-to Address: District Office Name and Address
Outgoing Envelope Type: Standard
Return Envelope Type: BRM

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No

2.48 Fiscal Reports

2.48.1 Overview

In the C-IV system, several fiscal reports were updated with SCR 1093 to generate for the GA/GR program. The same reports will be updated as part of this SCR.

2.48.2 Description of Change

1. Update the following monthly fiscal reports to generate for the Managed GA/GR program and aid codes listed below. All other programs and aid codes the reports generate for should remain the same. For LA county and the CalWIN counties, the listed fiscal reports will generate with the first occurring regular scheduled run of the reports after the SCR is implemented while for C-V counties, the scheduling of the reports will occur at the time of migration.
    a. Integrated Payroll Summary Report
    b. Integrated Payroll Benefit Issuance Detail Claiming Report
    c. Integrated Payroll Benefit Issuance Detail Claiming Report by Case
    d. Main Payroll Benefit Issuance EBT Register
    e. Main Payroll Benefit Issuance Direct Deposit Register
    f. Main Payroll Benefit Issuance Warrant Register

County	Program Code (18)	Program Description	Aid Code
Los Angeles	GA	General Assistance / General Relief	90

County	Program Code (18)	Program Description	Aid Code
Los Angeles	GA	General Assistance / General Relief	91
Los Angeles	GA	General Assistance / General Relief	92
All C-IV counties	GM	General Assistance (Managed)	90
All C-IV counties	GM	General Assistance (Managed)	91
All C-IV counties	GM	General Assistance (Managed)	92
All CalWIN Counties	GR	General Assistance / General Relief	90
All CalWIN Counties	GR	General Assistance / General Relief	91
All CalWIN Counties	GR	General Assistance / General Relief	92

2.48.3 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Fiscal**

2.48.4 Counties Impacted

All CalSAWS counties will be impacted by the changes outlined in this section.

2.49 Report Search and Report Parameter Pages

1. Update the 'Program' parameter in the Report Search page to display the appropriate General Assistance / General Relief option(s) available to the county. All other program values should remain the same.

   Global: Reports
   Local: Scheduled
   Task: [All tasks]

County	Program Code (18)	Display Value
Los Angeles	GA	General Assistance / General Relief
All C-IV counties	GM	General Assistance (Managed)
All C-IV counties	GN	General Assistance (Non-Managed)
All CalWIN Counties	GR	General Assistance / General Relief

2. Update the Program parameter for the following reports to display the appropriate General Assistance / General Relief option(s) available to the county. All other program values should remain the same:

   Global: Reports

   Local: On Request

   Task: Administrative

   Reports:

   Batch Eligibility Report

   Release Note Report

   Unassigned Program List

   Unverified E-Notification Request Report

   Global: Reports

   Local: On Request

   Task: Case Activity

   Reports:

Application Activity Report
Override / Manual EDBC Report
Pending Applications Report

Global: Reports
Local: On Request
Task: Employment Services
Reports: Activity Report
Employment Services Program Assignment Report

*Technical Note: The parameter page for the Activity Report and Employment Services Program Assignment Report is being updated to include General Assistance / General Relief due to it being shared among other listed reports in this section. These two reports, however, are programed to only show specific programs and the available options should remain the same.

2.50 Data Change Request

2.50.1 Overview

Default the values to maintain current General Assistance (Managed) benefit thresholds for C-IV counties. Also default Payment/Valuable Requests Authorization to require 1st Level Authorization for General Assistance (Managed).

2.50.2 Description of Change

1. Perform data change to the file 'CA-201377 Auth Lvl And Benefit Threshold For GM.xlsx' for Los Angeles and C-IV counties.

2.50.3 Estimated Number of Records Impacted/Performance

Approximately 120 records.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

1	Correspondence	GA Free Format NOA with GA NA Back 9(English)	"CSF 106 with GA NA Back 9.pdf"
2	Correspondence	GA Approval NOA (English)	"CSF 107.pdf"
3	Correspondence	GA Denial NOA (English)	"CSF 108.pdf"
4	Correspondence	GA Discontinuance NOA (English)	"CSF 109.pdf"
5	Correspondence	GA Benefit Change NOA (English)	"CSF 110.pdf"
6	Correspondence	GA Supplement NOA (English)	"CSF 111.pdf"
7	Correspondence	GA Agreement to Reimburse (English)	"CSF 112.pdf"
8	Correspondence	GA Periodic Report Form (English)	"CSF 113.pdf"
9	Correspondence	GA NA Back 9 (Spanish)	"GA NA Back 9 Spanish Translation.pdf)
10	Correspondence	GA NOA Spanish Translations	"CA-201377 GA NOA Translations.xlsx"
11	Correspondence	GA Agreement to Reimburse (Spanish)	"CSF 112 Spanish Translation.pdf"
12	Correspondence	GA Periodic Report Form (Spanish)	"CSF 113 Spanish Translation.pdf"

13	Fiscal	Fiscal Authorization and Benefit Issuance Threshold default values for GM	"CA-201377 Auth Lvl And Benefit Threshold For GM.xlsx"
14	Fiscal	Fund Code updates for Humboldt County	"SCR_CA_201377_Fund_Code_Mapping.xlsx"

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1457	The CONTRACTOR shall migrate the value of "DMV Fees/License" in the "Type" dropdown field when the Category of Transportation is selected on the Needs Detail page.		Need Detail information is being populated
2686	The CONTRACTOR shall integrate the CalWIN GA/GR rules into the CalSAWS Software. The Contractor shall migrate the existing C-IV GA/GR functionality which includes: - Creation of a GA/GR (Managed/Non-Managed) case - Ability to select the Issuance Method to EBT, Direct Deposit, or Warrant (check) - Ability to run a Manual EDBC to issue benefits to the customer, landlord or utility vendor - Ability to create a Service Arrangement/Payment Request to issue services / valuables	CalWIN GA/GR rules will be integrated into the CalSAWS solution in a future set of SCRs	The General Assistance (Managed) and General Assistance (Non-Managed) will be migrated into CalSAWS.
2315	The CONTRACTOR shall update the CalSAWS Software to provide the following GA/GR	CalWIN GA/GR rules will be integrated into the	The General Assistance (Managed) and General Assistance (Non-Managed) will

	functionality for the 58 Counties: 1) Prorate benefit amounts based upon the Beginning Date of Aid for the GA/GR Program 2) Add a hard validation message at EDBC when the GA/GR residency arrival date field on the Residency Detail Page is not completed. The validation message shall only display for those counties that opt into the 15-day residency rule. The CalSAWS Software should not allow the user to run EDBC when this validation occurs. Add a batch exception reason when the case is ran in batch. 3) Update the Pre-Screening-Mandatory Substance Use Disorder Recovery Program (MSUDRP) page to allow the 58 Counties to add additional pre-screening questions based on each of the 58 Counties GA/GR eligibility rules. The CalSAWS Software shall only display the Pre-Screening questions based on the county of the logged in user. 4) Add the ability to display prior GA/GR aid received in other counties within the CalSAWS Software (sanctions, Unemployable, Employable status, BDA, reapplication within a 12-month period and their time on aid in GR). Note:	CalSAWS solution in a future set of SCRs. Other updates targeted for all 58 counties will be addressed at that time.	be migrated into CalSAWS.

	The requirement is contingent upon county agreement and legal review 5) Create an automatic task when a participant has applied for SSI for the GA/GR program. The task hall be customizable by county and all 58 Counties shall have the ability to opt in/opt out of the task 6) Add the ability to issue a GA/GR need or supplement prior to approving the GR program (i.e. immediate need). 7) Add the ability to determine eligibility for GA/GR aid paid pending based on the eligibility rules of each of the 58 Counties. 8) Add the ability to allow each county to determine the income multiplier based on each of the 58 Counties GA/GR eligibility rules. 9) Add a verification field on the GR Work Requirement page when a work requirement type has been selected. If the verification field is left pending it shall populate on the county specific verification checklist for GA/GR. This functionality for the 58 Counties shall be opt in/out. 10) Create an automated task when the vendor for GA/GR is no longer going to get paid based on the Money Management		

	Detail page end month. This functionality will be based on each counties GA/GR program rules 11) Add GA/GR specific page(s) to capture physical and mental disability details as it relates to GA/GR assessment screening. The new page(s) shall be controlled via security to allow the 58 counties to opt in/out. NOTE: Page(s) should function similar to the MSDURP Assessment page. 12) Add the ability to automatically create a CalFresh CFET record when the customer is already participating in GA/GR for reporting purposes. The CalSAWS Software should not have the user enter a CFET record when GA/GR exists. The 58 Counties must have the ability to opt in/out of this functionality 13) Update all GA/GR related supportive services need types on the Needs List and Need Detail pages when the category of GROW is selected to be inclusive of all 58 counties. 14) Auto create and register a GA/GR ES program for employable individuals when there is a GA/GR/CF combo case when a county does not have CFET program active in their county. This functionality shall be made configurable for counties to opt in or out.		

	15) Auto create and register a GA/GR ES program for employable individuals who are on a GA/GR program only. This functionality shall be made configurable for counties to opt in or out 16) Add additional non-compliance types for GA/GR on the GA/GR Non-Compliance page. The Non-Compliance types shall be specific to each of the 58 Counties GA/GR policy rules 17) Migrate the existing C-IV GA/GR Functionality into the CalSAWS Software		

5 APPENDIX

A. Code Detail Table Category 73 Program Reason Codes

Status Reason	Code Identif	GM Close Program	GM Close Person	General Assistance (Managed)
$0 Allotment	71	Y	Y	
1st Instance	W9		Y	Y
1st instance sanction	HA		Y	Y
2nd Instance	WN		Y	Y
2nd instance sanction	HB		Y	Y
3-Month time limit	3M	Y	Y	Y
3rd Instance	WO		Y	Y
3rd instance sanction	HC		Y	Y
Added to CW AU	68		Y	
Adult in home to provide care	ID		Y	Y
Age	81		Y	Y
Age Requirement	DK		Y	Y
Already Got Exception	D2		Y	
Application Opened in Error	09	Y	Y	
Applied for or Receiving Unemployment	WR		Y	
Approved for CW	67			Y
Calif. Residence	05	Y	Y	Y
Child	IH		Y	
Child Applied for Self	CR		Y	
Chronic Truant	GD		Y	
County Residence	DY	Y	Y	Y
Customer Requested	I7			Y
Declined Elig	04			Y
Deceased	JK		Y	
Did not SFIS	CB		Y	Y
Didn't Apply for SSI	DF		Y	Y
Didn't Co-Op JS #1	L3		Y	Y
Didn't Co-Op JS #2	L4		Y	Y
Didn't Co-Op JS #3	L5		Y	Y
Didn't Co-op with SP-DDSD	CU		Y	
Didn't Cooperate	DG	Y	Y	Y

Didn't Go to Job #1	BR		Y	Y
Didn't Go to Job #2	BS		Y	Y
Didn't Go to Job #3	BT		Y	Y
Didn't Meet WTW #1	BL			Y
Didn't Meet WTW #2	BM			Y
Didn't Meet WTW #3	BN			Y
Didn't Register EDD	CS		Y	Y
Didn't Sign WTW	BI			Y
Didn't Sign WTW #2	BJ			Y
Didn't Sign WTW #3	BK			Y
Doesn't Meet Program Req.	E8		Y	Y
Drug/Alcohol program Participant	WU		Y	Y
Due to employment	HS		Y	Y
Duplicate Application	10	Y	Y	
Earnings - Other Person	44		Y	
End of Cert Period	KZ	Y	Y	Y
Failed Property	G2	Y	Y	Y
Failed to Complete Determination	16	Y	Y	Y
Failed to Complete ES Requirements	KV	Y	Y	
Failed to Complete Redetermination	RD	Y	Y	Y
Failed to meet work req.	IE	Y	Y	Y
Failure to Provide School Attendance	KF		Y	
Failure to Provide	GC			Y
False Residence/ID	B4		Y	Y
Fleeing Felon	C1		Y	
FTP Age Verification	JU		Y	
FTP County Residence	ES	Y	Y	
FTP Eligibility Forms	82	Y	Y	
FTP HIC #	CK		Y	
FTP Income	DW	Y	Y	
FTP INS Document	61		Y	
FTP Multiple Vehicles	KQ	Y	Y	
FTP Name/Identity	CJ		Y	
FTP One Vehicle	KP		Y	
FTP Property	C8	Y	Y	
FTP Required Info	I8	Y	Y	
FTP Sponsor Dependents	C5		Y	
FTP Sponsor Income	C6	Y	Y	

FTP Sponsor Property	C7	Y	Y	
FTP Sponsor SOF	AE	Y	Y	
FTP Vendor Information	JY	Y	Y	
FTP Verification	83	Y	Y	Y
Gets AAP	FU		Y	
Gets APTC	ZT		Y	
Gets ARC	FG		Y	
Gets CalWORKs	77		Y	Y
Gets CAPI	Y8		Y	
Gets CF Inside HH	JG		Y	
Gets CF Outside HH	JN		Y	
Gets FC	FV		Y	
Gets IHSS	CT		Y	
Gets Kin-GAP	FT		Y	
Gets RCA	FS		Y	
Gets SSI	JW		Y	
Gets SSI/SSP	25		Y	Y
Gets Tribal TANF	KD		Y	
Gets Waiver	EF	Y	Y	
Has $100 in LR	78	Y	Y	
Has No Exception	CZ	Y	Y	
Has No Housing Costs	D4	Y	Y	
Incomplete application	IF	Y	Y	Y
Incomplete re-certification	IC	Y	Y	Y
Ineligible Non Citizen	93		Y	Y
Institutionalized	08		Y	
Inter-County Transfer	85			Y
Mandatory/Optional Rules	21		Y	Y
Need Met by CF	56	Y	Y	
Need Met by Community Resource	F6	Y	Y	
Need Met by HA	57	Y	Y	
Need Met by MC	58	Y	Y	
No Apparent CW Elig.	66	Y	Y	
No Appl - Req Person	22	Y	Y	Y
No Deprivation	95		Y	
No Eligible Mem	11	Y		
No Open Application	GB		Y	
No Remaining Benefits	F5	Y	Y	Y
No SAR7 for Prior Month	SB	Y	Y	
No Show/FTP #1	BO	Y	Y	

No Show/FTP #2	BP	Y	Y	
No Show/FTP #3	BQ	Y	Y	
No Valid Emergency	65	Y	Y	
Not a Permanent Place	D9	Y	Y	
Not Eligible for CW	D5	Y	Y	
Not participating in activity	H2	Y	Y	
Not providing proof of satisfactory progress in assigned activity	WQ	Y	Y	
Not Seeking Housing	D8	Y	Y	
Not signing the WtW Plan	H1	Y	Y	Y
Off aid - other reason	HF	Y	Y	Y
Off aid due to employment	HE	Y	Y	Y
Off Cash Aid	OC	Y	Y	Y
On Aid Another Case	CN		Y	
Out of the Home	19		Y	Y
Out of the Home – Incarcerated	OI		Y	
Over $100 Limit	D6	Y	Y	
Over Income	39	Y	Y	Y
Over Resources	12	Y	Y	Y
Probation/Parole Violator	C3		Y	
Quit Job	B9		Y	Y
Quit Job #1	EZ		Y	
Quit Job #2	BA		Y	
Quit Job #2	F1		Y	
Quit Job #3	BB		Y	
Quit Job #3	F2		Y	
Quitting a job	H4		Y	
Reduced Earnings	BF	Y	Y	
Reduced Earnings #2	BG	Y	Y	
Reduced Earnings #3	BH	Y	Y	
Reduced Hours #1	BU		Y	
Reduced Hours #2	BV		Y	
Reduced Hours #3	BW		Y	
Reducing their earnings	H5		Y	
Refused DIB	32		Y	Y
Refused Inc-Collect Debt	EB		Y	
Refused Inc-Life Ins	EA		Y	
Refused Job	B6		Y	Y

Refused Job #2	B7		Y	
Refused Job #3	B8		Y	
Refused Military Ben	35		Y	
Refused Retirement	33		Y	
Refused SDI	34		Y	Y
Refused UIB	30		Y	Y
Refused VA	31		Y	Y
Refused Wkr Cmp	36		Y	Y
Requested Disc. – Verbal	06	Y	Y	Y
Requested Disc. – Written	K4	Y	Y	Y
Requested Exclusion	E4		Y	Y
SAR 7 Incomplete	SC			
SAR 7 Not Received	SD			
Shelter Not Valid	DA	Y	Y	
Sponsor Met AU's Needs	AD	Y	Y	
Sponsor Met Mem's Needs	AC	Y	Y	
Sponsor Status	DM	Y	Y	
Spouse	EL		Y	Y
Spouse of FTP Income	K7		Y	
SSA	48		Y	Y
SSA/SSI Denied within 12 Months	K9		Y	
Student Half Time or More	WV		Y	
Support from Absent Parent	46		Y	
Support from Other Person	47		Y	
Support serv temp unavail	FC		Y	
Turned Down a Job #1	EW		Y	Y
Turned Down a Job #2	EX		Y	Y
Turned Down a Job #3	EY		Y	Y
UIB	51		Y	Y
Unrelated Prim Appl	23		Y	
Verbal Withdrawal	E5	Y	Y	Y
Veteran's Benefits	50		Y	
Vital Statistics Unverified	KT		Y	
Waiting for CalWORKs	WC	Y	Y	
Welfare to Work / Alternative Employment Program	WX	Y	Y	
Whereabouts Unknown	07	Y	Y	Y

WPR	15	Y	Y	
Written Withdrawal	18	Y	Y	Y

B. Program Code Reference Values

Code_Num_Identif	GN	GM
SHORT_DECODE_NAME	General Assistance (Non-Managed)	General Assistance (Managed)
Program Code	N	Y
Other Assistance Program Code	Y	Y
Considered Public Assistance	N	N
FS Count in Allotment	Y	Y
Multiple Programs Allowed	N	Y
Organization as Payee	Y	N
Intake Program	N	Y
Report Inter-County Transfer	N	N
Eligibility EDBC Indicator	N	N
NOABenefitType		
Caseload Search Indicator		
Intake Redetermination Flag	N	N
WDTIP Program Codes		
External Programs	Y	
Manual EDBC Indicator	N	Y
Redetermination Indicator	N	N
Recovery Account Indicator	Y	Y
Allow Service Arrangement		Y
Aid Code Base Program		
Un-Reimbursed Assistance Program Codes	N	Y
SIU Referred Program	Y	Y
RA Uncollectible Status	N	N
Uncollectible Cash		
IPV Programs	C	C
Is Application Considered	Y	Y
Time Limits Program		
C4Yourself		
Managed Application	N	Y
EICT		
EICT Programs		
Reception Log Program Codes	GA	
RCC Programs		
Call Log Program Codes	General Assistance	
LALegacyPgmCodes		
Case Flag Programs		Y

Receipt Programs		
Program Hierarchy	2	2
YBN_Outbound		
Job Development Activity		
ES Search Code		
Change Reason Program		
Distinguish between DCFS and DPSS Programs		
Spanish		
Pending Authorization Days To Complete		
Program Code to Display	GN	GM
EBT Stagger Program		
YBN_EW_Communication		
Program Rescission Time Limit	0	0
Leader Program Name	GA	GA
Authorized Representative		
Program to display online		Y
Activity Agreement programs	General Assistance (Non-Managed)	General Assistance (Managed)
Program Code	N	N

C. Code Table (CT 562) Set the Issuance Threshold Amounts based on the table below:

County	Issuance Threshold Amount
Alpine	$1000.00
Amador	$500.00
Butte	$1,000.00
Calaveras	$1,000.00
Colusa	$1,121.00
Del Norte	$500.00
Glenn	$500.00
Humboldt	$465.00
Imperial	$393.00
Inyo	$600.00
Kern	$1,000.00
Kings	$1,000.00
Lake	$500.00
Lassen	$0.00
Madera	$881.00
Marin	$387.00
Mariposa	$800.00
Mendocino	$2000.00
Merced	$407.00
Modoc	$296.00

Mono	$1,000.00
Monterey	$1499.00
Napa	$1,000.00
Nevada	$400.00
Plumas	$500.00
Riverside	$436.00
San Benito	$500.00
San Joaquin	$474.00
Shasta	$700.00
Sierra	$1000.00
Siskiyou	$562.00
Stanislaus	$604.00
Sutter	$260.00
Tehama	$600.00
Trinity	$500.00
Tuolumne	$700.00
Yuba	$2000.00

D. recovery account transactions.

TRANSACTION TYPES:
Payment Types
Benefit Reduction
Cash
Check
Compromised
Courtesy Collection
Credit/Debit Card
EBT – CalFresh
EBT – Cash
Equitable Estople
Expungement
ICT In from another County
Judgement
Lein
Lost Adjustment
Money Order
Offset
Other Agency Collection
Payment Reduction
Prior Collection
R&R Collection
R&R Refund
Recoveries of Aid – SSI
Reimbursement of Aid
Returned Warrant
Tax Intercept Reversal
TI - FTB (cash)
TI - FTB (CF)
TI - IRS (17.5% State)
TI - IRS (17.5% County)
TI - IRS (35%)
TI - IRS (65%)
TI - Process Refund
Transfer to General Fund
Wage Garnishment
Written Off

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-212469

Generic Appointment Letter for all Programs

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jamie Ng
	Reviewed By	Lawrence Samy

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/16/2020	1.0	Original Draft	Jamie Ng
07/06/2020	1.1	Updated after BA review	Jamie Ng
07/16/2020	1.2	Updated Section 1.4, 2.1.2.2 after committee review	Jamie Ng
7/31/2020	1.3	Updated sections 1.3 & 2.1.2.2 after additional committee review	Phong Xiong
10/5/2020	1.4	Content Revision 1 – Updated sections 1.3, 1.4, 2.1.2.2, & 2.1.2.3	Phong Xiong
12/30/2020	1.5	Design Clarification for WTW/REP assumptions in section 1.4	Phong Xiong
12/31/2020	1.6	Content Revision 2 – Updates to sections 1.4, 2.1.2.1, & 2.1.2.3	Phong Xiong

Table of Contents

1 OVERVIEW

This SCR will create Generic Appointment Letter for all programs for Los Angeles County. The other 57 counties will be using the newly updated generic appointment letter CSF 105. (SCR CA 217605, CA-214990, CA-214992 & CA-217362)

1.1 Current Design

Currently, CW2200 contains appointment verbiage and it is generated for appointment notices across programs when 'print appointment letter' box is checked.

1.2 Requests

Create and automate Generic Appointment letter for all programs to use for Los Angeles County. The new letter should generate as a stand alone from Template Repository or from the customer appointment page.

1.3 Overview of Recommendations

1. Create Generic Appointment Letter for all programs for LA county for all programs except Medi-cal, WTW, REP, Cal-Learn, Child Care and GROW.

1.4 Assumptions

1. CW 2200 appointment verbiage will be removed with DDID 452 (SCR CA-207451) for the same release as this SCR in 21.01 release.
2. After this SCR is implemented, worker will need to go to verifications page to generate CW 2200 for verifications and customer appointment detail page to generate this Generic Appointment Letter.
3. The appointment-types within the appointment categories will not be listed since their functionalities are not changed. If the new form generates for a category, it will also generate for their respective appointment-types.
4. County workers will be responsible for verifying pre-populated Worker information on the form.
    a. Currently NA840 (For first parent) / NA845 (For second parent) will be triggered when Appointment type is "Non Compliance Cause Determination" and status reason is one of the below:
        i. Not signing the WTW Plan
        ii. Not participating in activity
        iii. Not accepting a job
        iv. Quitting a job
        v. Reducing their earnings
        vi. Not providing proof of satisfactory progress in assigned activity
        vii. Post WTW 24 MTC Fed Standards Not Met - Participation
        viii. Post WTW 24 MTC Fed Standards Not Met - Progress
        ix. Failed to sign post 24 MTC Fed plan
        x. Post WTW 24 MTC Failed to Sign Subsequent Fed Plan

    b. Currently if the appointment is Noncompliance Cause Determination and the status reason is none of the above mentioned in 4a, then GN 6010 will generate.
5. The CSF 156 variable population logic will follow the CW2200 (prior to these changes) pre-population logic in both the body and header of the form.
6. New Generic Appointment Letter will not replace current WTW/REP, Cal-Learn, REP appointment letters currently in the system below:

WTW/REP

1. Appraisal Appointment – GN 6053-1 (WTW) / GN 6053-R (REP)
2. Cure Sanction Appointment – GN 6178
3. General Appointment – GN 6010
4. Noncompliance Cause Determination Appointment – NA 840 / NA 845, GN 6010
    a. The WTW program status must be set to Noncompliance before the Cause Determination appointment can be scheduled in order to generate the NA 840 / NA 845 via batch and Online. Otherwise, GN 6010 is generated.
5. Noncompliance Home Visit – GN 6326
6. Sanction Home Visit – GN 6327
7. Time Limit Review – WTW 46

Cal-Learn

1. Cal-Learn Noncompliance Cause Determination – CL3
2. Cal-Learn Orientation – CL1

GROW

1. Case Manager Appointment – APB 1460
2. Return GROW 85 – GROW 85
3. Return Job Development – JDM Job Development

General relief

1. ABP 131 – Appointment Notice for General Relief Substance Abuse Recovery Assessment

4. Online changes related to generation of this Generic Appointment Letter will be addressed in future SCR.

2 RECOMMENDATIONS

1. Create Generic Appointment Letter for all Programs except Medi-Cal, WTW, REP, Cal-Learn, Child Care and GROW.

2.1 New Generic Appointment Letter for all program

2.1.1 Overview

The effort is adding the new Generic Appointment Letter Form CSF 111 (revision 7/20). This new form is to be sent for Telephone/ Face-to-Face appointments for all programs.   This Generic Appointment Letter is only for Los Angeles County.

Programs: All except Medi-cal, WTW, REP, Cal-Learn, Child Care and GROW.

Attached Forms: N/A

Forms Category: Form

Languages:

English, Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.

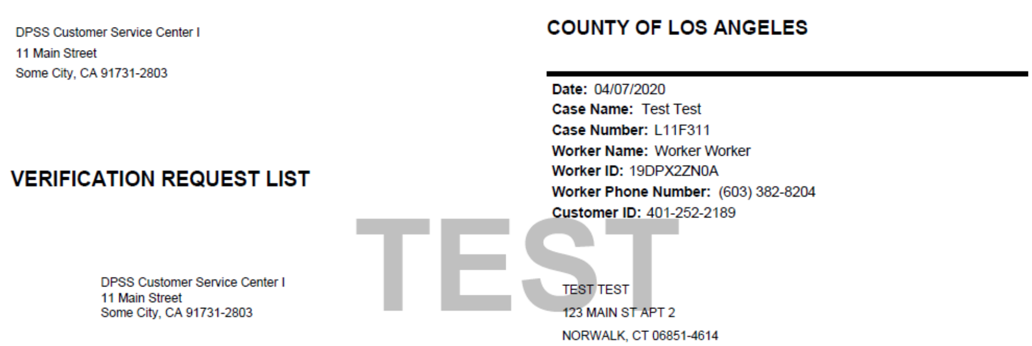
(Need Translation for Arabic, Armenian, Cambodian, Chinese, Farsi, Hmong, Korean, Lao, Russian, Spanish, Tagalog, and Vietnamese.)

2.1.2 Description of Change

Add new Appointment Letter form for all programs except Medi-Cal, WTW, REP, Cal-Learn, Child Care and GROW.

2.1.2.1 Create new Generic Appointment Letter XDP

Form Header: : LRS/CalSAWS Standard Header



DPSS Customer Service Center I
11 Main Street
Some City, CA 91731-2803

COUNTY OF LOS ANGELES

Date: 04/07/2020
Case Name: Test Test
Case Number: L11F311
Worker Name: Worker Worker
Worker ID: 19DPX2ZN0A
Worker Phone Number: (603) 382-8204
Customer ID: 401-252-2189

VERIFICATION REQUEST LIST

TEST

DPSS Customer Service Center I
11 Main Street
Some City, CA 91731-2803

TEST TEST
123 MAIN ST APT 2
NORWALK, CT 06851-4614

Form Title: Appointment Letter

Form Number: CSF 111

Form Name: Appointment Letter

Form Visibility: LA County only

Include NA Back 9: No

Form Mockups/Examples: See Supporting Documents #1.

Note: The worker information populated on the form header will the same worker information pre-populated in the body of the form in section 2.1.2.3.

2.1.2.2 Add Form Generation

New Generic Appointment Letter (CSF 111) form will be triggered from the ""Print Appointment Letter" checkbox from the Customer Appointment Detail page at any time when the worker schedules appointments. When this form is triggered , it will be shown as a pop-up where the user can print the form online or it can go out with Batch process.

New Generic Appointment Letter will be generated when these appointment categories are scheduled on Customer Appointment Detail page:

- Telephone Interview
- Counselor Meeting
- Intake Interview
- Home Visit
- Meeting with Worker
- Group Meeting
- IEVS Interview
- Preventative Fraud Interview
- General Appointment
- Provider
- QC Case Review
- YBN Appointment

New Generic Appointment Letter will NOT be generated when these appointment types is scheduled on Customer Appointment Detail page:

- Telephone CW/CF RE Interview
- Cal-Learn
- GROW
- WTW/REP
- Re-Evaluation Interview
- Re-Evaluation CW/CF Interview

Do not generate New Generic Appointment Letter if any of below appointment letter is currently generated in Customer Appointment Detail Page:

<u>WTW/REP</u>

1. Appraisal Appointment – GN 6053-1 (WTW) / GN 6053-R (REP)
2. Cure Sanction Appointment – GN 6178
3. General Appointment – GN 6010
4. Noncompliance Cause Determination Appointment – NA 840 / NA 845
5. Noncompliance Home Visit – GN 6326
6. Sanction Home Visit – GN 6327
7. Time Limit Review – WTW 46

<u>Cal-Learn</u>

8. Cal-Learn Noncompliance Cause Determination – CL3

9. Cal-Learn Orientation – CL1

GROW

10. Case Manager Appointment – APB 1460
11. Return GROW 85 – GROW 85
12. Return Job Development – JDM Job Development

General relief

13. ABP 131 – Appointment Notice for General Relief Substance Abuse Recovery Assessment

Since the trigger on Customer Appointment Detail page will be updated to generate the new generic appointment letter, the CW 2200 will no longer generate from the Customer Appointment Detail page. The workers will have to generate the CW 2200 from the Verification List page.

There is no requirement to create appointment in order to generate CW 2200.

2.1.2.3 Add Form Variable Population

The new Generic Appointment Letter Form has new Variables that will be populated.

APPOINTMENT LETTER

?   ?

?   ?

Date :
Case Number :
Case Name :
Worker Name :
Worker Number :
Worker Telephone :
Address :

☐ You have a telephone interview appointment. **If you prefer to be interviewed in person, please call the county at the number above for an appointment.** 1

APPOINTMENT DATE: 2	APPOINTMENT TIME: 3
YOUR PHONE NUMBER: 4	ALTERNATIVE PHONE NUMBER: 5

We will call you at the phone number provided above. If the number is not correct, you must call us and provide a number where you can be reached for your interview. It is very important that we are able to reach you. You may also want to provide an alternative phone number where you can be reached. County phone numbers may be blocked. If your phone does not accept blocked numbers, you may miss the phone call for your telephone interview, and your benefits may be delayed. If you miss your scheduled interview you will have to reschedule your interview. Call the county at the number above to reschedule your interview.

☐ You have a face-to-face interview appointment. 6

APPOINTMENT DATE: 7	APPOINTMENT TIME: 8
APPOINTMENT WITH: 9	
DURATION: 10	
LOCATION: 11	

IMPORTANT REMINDERS

- Failure to complete this interview may result in a delay or may end your benefits.
- To change your appointment, please contact the county.
- Please tell the county if you need help getting this information. The county can help you get it.
- If you are applying for benefits, an interview is required. If you cannot keep this appointment, it is your responsibility to reschedule. The application process must be completed by ____________; if you fail to complete the process by this date, you will need to reapply. 12

COMMENTS:

13

CSF 111 (7/20)

Form Body Variables:

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
1	You have a Telephone interview appointment	Check if Category: • Telephone Interview is scheduled on Customer Appointment Detail page. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y
2	Appointment Date	Appointment date from customer appointment detail page Populated if #2 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y
3	Appointment Time	Appointment time from customer appointment detail page Populated if #2 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
4	Your Phone Number	Populate phone number in contact detail page. Note: If multiple phone numbers exist for a Customer, populate only one phone number. Select the phone number from the following phone number type hierarchy: 1) Main 2) Home 3) Cell 4) Work Populated if #2 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y
5	Your Alternative Phone Number	Not Populated Editable when a blank form is generated.	Y	N	N

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
6	You have a face-to-face interview appointment	Check if Category: • Counselor Meeting • Intake Interview • Home Visit • Meeting with Worker • Group Meeting • IEVS Interview • Preventative Fraud Interview • General Appointment • Provider • QC Case Review • YBN Appointment is scheduled on Customer Appointment Detail page Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y
7	Appointment Date	Appointment date from customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
8	Appointment Time	Appointment time from customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y
9	Appointment With	Worker name in customer appointment page. Multiple workers could be displayed on the page; however, there is no set order for how the workers are displayed. Populated with the name of the first worker displayed on the customer appointment page if #6 checkbox is checked. Editable when a blank form is generated and generating via appointment detail page.	Y	Y	Y
10	Duration	Duration from customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y

NUMBER	ELEMENT	COMMENTS	EDITABLE	TEMPLATE REPOSITORY POPULATION	POPULATES WITH FORM GENERATION
11	Location	Location entered in customer appointment detail page Populated if #6 checkbox is checked. Editable when a blank form is generated. Pre-populated and Static when form is generated in the context of a case.	Y	Y	Y
12	If you are applying for benefits, an interview is required. If you cannot keep this appointment, it is your responsibility to reschedule. The application process must be completed by **<date>**; if you fail to complete the process by this date, you will need to reapply.	Not Populated Editable when a blank form is generated and generating via appointment detail page.	Y	N	N
13	Comments	Not Populated Editable when a blank form is generated and generating via appointment detail page.	Y	N	N

2.1.2.4 Add Form Control

The new Generic Appointment Letter Form will not have a form control date.

Due Date: N/A

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

2.1.2.5 Add Form to Template Repository

The new Generic Appointment Letter Form will be added to Template Repository. The form will not have any pre-population aside from the Header.

Required Document Parameters: Case Number, Customer Name, Program, Language

2.1.2.6 Add Form Print Options and Mailing Requirements

The following Print Options will be included for the new Generic Appointment Letter Form:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Requirements:
Outgoing Envelope Type: Standard Outgoing
Return Envelope Type: N/A
Mail to:
When generated from Customer Schedule Page: Addressee selected from Customer Appointment Page
When generated from template repository: Customer name selected from document parameters page

Additional Requirements:

Post to YBN/C4Y: Yes

2.2 Remove CW 2200 trigger on Customer Appointment Detail page

2.2.1 Overview

Remove current CW2200 trigger on Customer Appointment Detail page. CW 2200 will not be generated by appointments from Customer Appointment Detail page. It will only be generated from verficiations page.

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	Correspondence	Generic Appointment Letter Mockup	Generic Appointment letter mockup.pdf

4 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.18.3.3 CAR-1239	The LRS shall produce various notices, NOAs, forms, letters, stuffers, and flyers, including: a. Appointment notices; b. Redetermination, Recertification, and/or Annual Agreement notices and forms; c. Other scheduling notices (e.g., quality control, GR hearings, and appeals); d. Periodic reporting notices; e. Contact letters; f. Notices informing the applicant, participant, caregiver, sponsor or authorized representative of a change in worker, telephone hours or Local Office Site; g. Information notices and stuffers; h. Case-specific verification/referral forms; i. GR Vendor notices; k. Court-mandated notices, including Balderas notices; l. SSIAP appointment notices; m. Withdrawal forms; n. COLA notices; o. Time limit notices; p. Transitioning of aid notices; q. Interface triggered forms and notices (e.g., IFDS, IEVS); r. Non-compliance and sanction notices; s. Benefit issuance and benefit recovery forms and notices, including reminder notices; t. Corrective NOAs on State Fair Hearing decisions; u. CSC paper ID cards with LRS-generated access information; and v. CSC PIN notices.	Create new generic appointment letter With appropriate verbaige

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214031

Case Coversheet Generation

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sarah Steimle
	Reviewed By	Michael Wu, Gabriel Trejo, Dana Petersen, Priya Sridharan, Sreekanth Kalvoju, Long Nguyen, Sumeet Patil, Jonathan Goldsmith, Lawrence Samy, Matthew Lower, Jennifer Kim, Cory Wozniak, Christopher Vasquez, Rhiannon Chin, Erick Arreola

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
4/22/2020	1	New design document	Sarah Steimle
6/1/2020	2	Updated online approach	Sarah Steimle
10/12/2020	3	Content Revision: Sections 2.4 and 2.5 Print Local without Save to No	Gillian Noelle Bendicio
10/23/2020	3.5	Design Clarification: Updated mockup section numbering in Section 2.1 Updated Figures 2.1.2 and 2.1.4 to match the verbiage found on Description of Changes Updated Security of Updates of 2.1 and 2.2 to remove the Supervisor role to match the Security Matrix	Gillian Noelle Bendicio
11/12/2020	3.6	Design Clarification: Updated Coversheet/Separator Mockups to include Form Title as Title not Header Updated to include Form Title font size in Section 2.3	Gillian Noelle Bendicio
12/30/2020	3.7	Design Clarification: Include assumption regarding browser pop-up method	Gillian Noelle Bendicio
01/04/2021	4.0	Content Revision3: Section 2.2.6 Remove Page Mapping Requirement	Erika Kusnadi-Cerezo

Table of Contents

1 OVERVIEW

This SCR will be implementing the capability to generate coversheets for multi-case scan mode and implement the capability to create a coversheet from the Case Summary Page. This SCR will also be adding a Generic Separator Sheet and No Case Identified Separator Sheet to the template repository.

1.1 Current Design

Currently there is no functionality in the system to generate multiple barcoded coversheets at a time that are associated to a case in LRS. Currently, there is no centralized access point to the Generic Separator Sheet and there is no No Case Identified Separator Sheet.

1.2 Requests

The request is to add functionality in the system to generate barcoded coversheets to the LRS system and add the Generic Separator Sheet and No Case Identified Separator Sheet to the Template Repository.

1.3 Overview of Recommendations

1. Create a Generate Coversheet page in CalSAWS that will validate and create barcoded coversheets for each case that is validated.
2. Add a Generate Coversheet button to the Case Summary page to create a barcoded coversheet for the case the worker is on.
3. Add the Generic Separator Sheet and the No Case Identified Coversheet to the Template Repository.

1.4 Assumptions

1. Fields not mentioned in the Description of Changes sections, will not be updated.
2. Multi-case scan mode will be functionality in the Imaging System.
3. The Imaging solution will be able to read and direct documents to the correct case based on the information provided in the barcoded coversheets.
4. Only counties that have this functionality turned on will be able to utilize this functionality.
5. The Generic Separator Sheet is provided by the imaging software.
6. The Generic Separator Sheet is the same for all counties.
7. The No Case Identified Separator Sheet is created by the Imaging Team.
8. The No Case Identified Separator Sheet is the same for all counties.
9. Users are responsible for printing PDF coversheets single side only.
10. The pop-up message will display based on the browser's built-in alert functionality.

2 RECOMMENDATIONS

2.1 Coversheet Generation

2.1.1 Overview

Add the Coversheet Generation page to the LRS System. The Coversheet Generation page provides the client functionality to generate barcoded coversheets in order to scan multiple cases into the system at a time. This feature will only be available when the county is set to use this solution.

2.1.2 Coversheet Generation Mockup

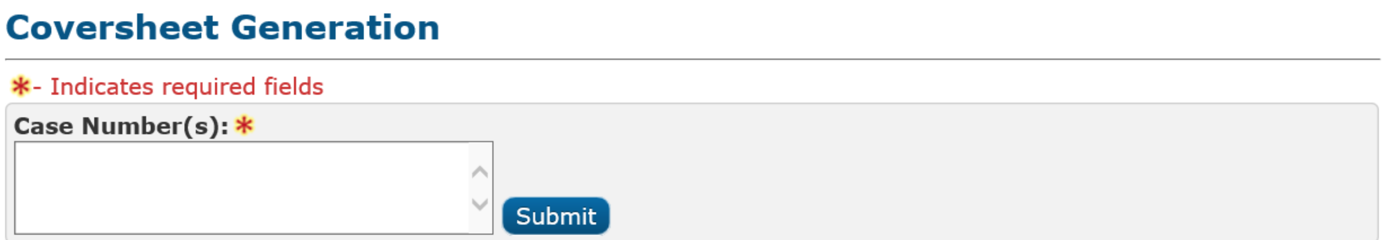
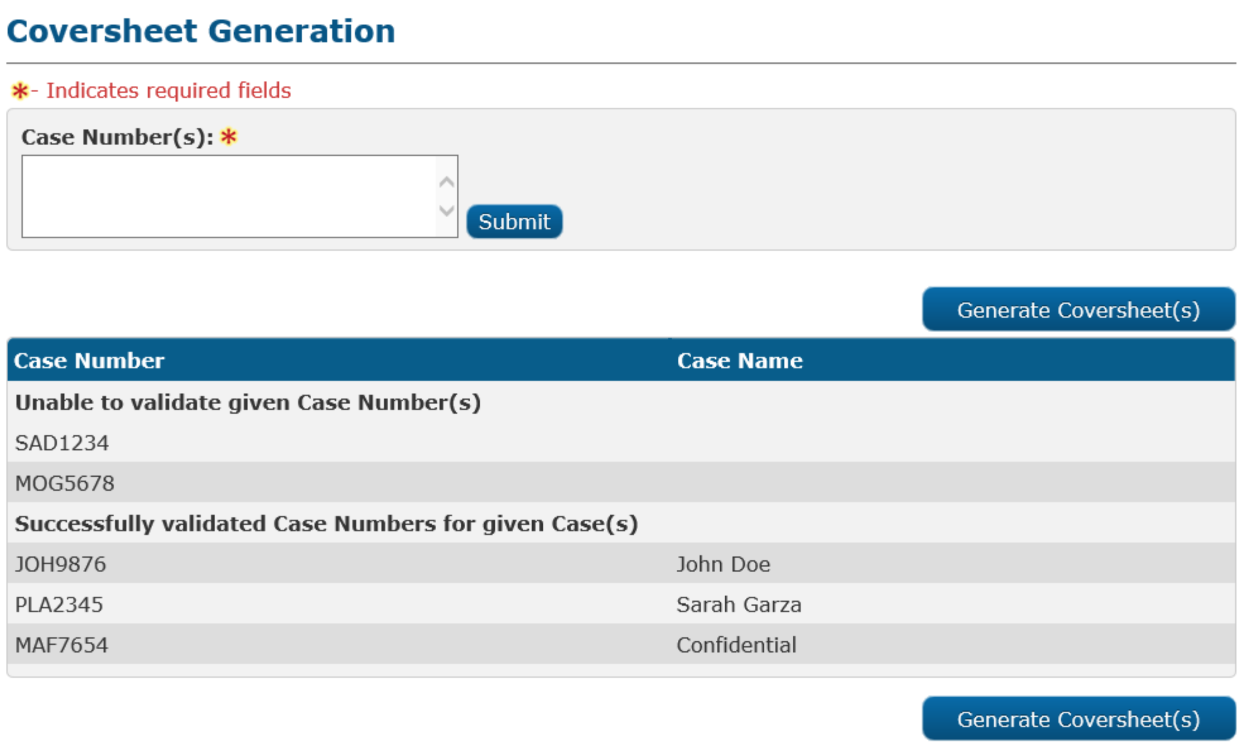


Figure 2.1.1 – Coversheet Generation



Case Number	Case Name
Unable to validate given Case Number(s)	
SAD1234	
MOG5678	
Successfully validated Case Numbers for given Case(s)	
JOH9876	John Doe
PLA2345	Sarah Garza
MAF7654	Confidential

Figure 2.1.2 – Coversheet Generation (Searched Cases with no matching cases)

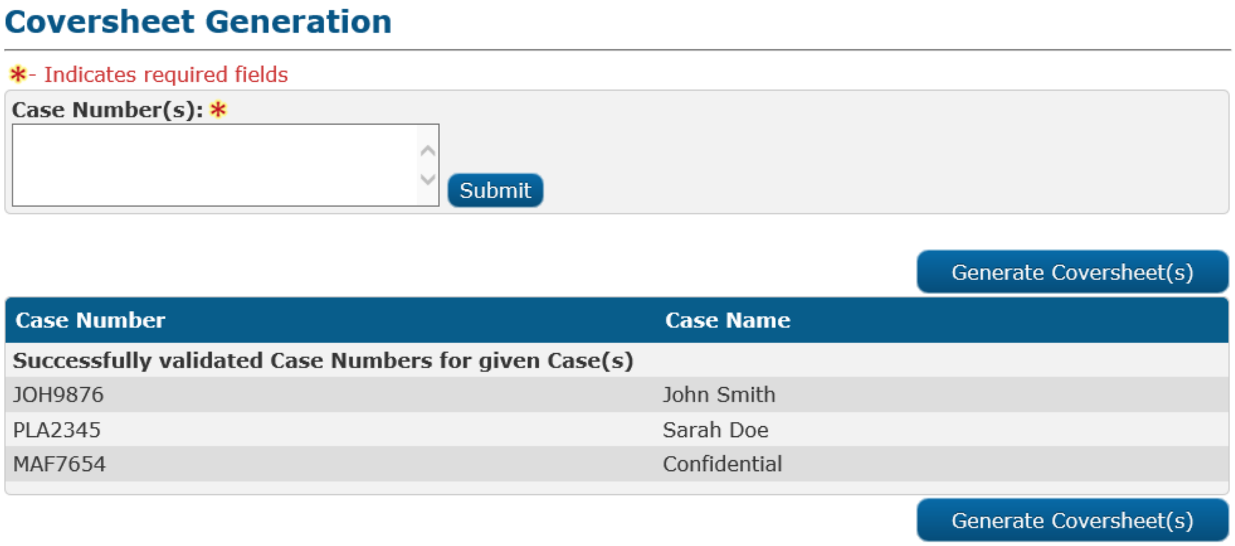


Figure 2.1.3 – Coversheet Generation (Searched Cases without Error)

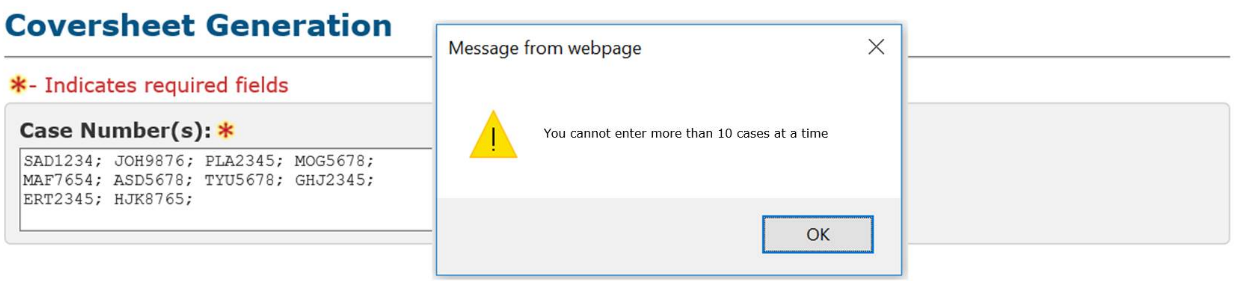


Figure 2.1.4 – Coversheet Generation (More than 10 Case Numbers Entered)

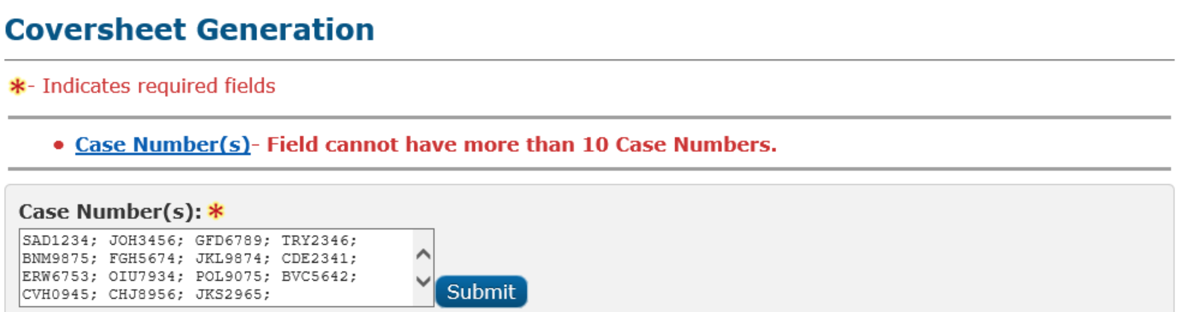


Figure 2.1.5 Coversheet Generation Validation (More than 10 Case Numbers)

2.1.3 Description of Changes

1. Case Number(s) – The Case Number(s) that the worker is creating barcoded coversheets for. Each case number must be separated by a semi colon. If the worker inputs more than 10 cases, then a pop up will appear with an error message stating: "You cannot enter more than

10 cases at a time”. The elements behind the pop up will be disabled until the worker clicks “Ok”.

2. Submit – Clicking the Submit button validates that the case(s) typed in by the worker are valid and in the county the worker is in. The results are displayed in the Case table. All white space between the semi-colon and the characters will be trimmed prior to searching for cases. The trimmed value(s) will be used to search for cases in the worker's county. These trimmed value(s) will display in the Case Number field aligned with the other resulting information. After the results are displayed the values in the Case Number(s) field will no longer be present.
3. If a user types in more than 10 Case Numbers in the Case Number(s) text box and clicks the Submit button, then create the following custom validation for the Coversheet Generation page:
    a. “Case Number(s) - Field cannot have more than 10 Case Numbers.”
4. Case(s) table – This section displays when one or more case(s) were submitted by the worker. If the worker submits a case that is unable to be validated, then the Case Number(s) will be listed under the following in line statement:
    a. “Unable to validate given Case Number(s)”

   If the worker submits Case Number(s) that are valid, then the case information will be listed under the following in line statement:
    b. “Successfully validated Case Numbers for given Case(s)”

   The variables displayed under this in line statement are <Case Number> and <Case Name>. The user will not be able to see confidential case names unless the user has the security rights to view the case. If the case is confidential and the user does not the security rights to see the case then the Case Name will be displayed as “Confidential”. If the user has the security rights to view the confidential case then the user will be able to see the Case Name in the Case(s) Table.

   The cases will be ordered the way the client entered them into the Case Number(s) text box in each respective section.

5. Generate Coversheet(s) Button – Clicking the Generate Coversheet(s) button will only generate barcoded pdf pages for the valid cases. The barcoded PDF pages will be stitched together into one adobe pop up window for the worker to print from (See supporting document #4, Imaging Multi Case Coversheet Mockup). Each page has a unique case. These barcodes will have the case’s identification placed into the barcode. This button is dynamic to the completed submission of one or more cases that returned valid. This feature will only be available when the county is set to use this solution.

2.1.4 Page Location

- **Global: Client Corresp.**
- **Local: Barcodes**
- **Task: Coversheets** (This task nav item will display directly below the Barcodes task nav item. Only workers with the "ImagingCapture" security right will be able to see this task nav item.)

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingCapture	Allows the worker to scan in documents to the imaging system.	Imaging Capture

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Capture	Allows the worker to scan documents into the imaging system.	Child Care Staff Child Care Supervisor Clerical Staff Clerical Supervisor Collections Staff Eligibility Staff Eligibility Supervisor Employment Services Contracted Staff Employment Services Contracted Supervisor Employment Services Staff Employment Services Supervisor Executive Fiscal Staff Fiscal Supervisor

Security Group	Group Description	Group to Role Mapping
		Hearings Staff Hearings Supervisor Help Desk Staff Marketing Staff Marketing Supervisor Quality Assurance Staff Quality Assurance Supervisor Quality Control Staff Quality Control Supervisor RDB Staff RDB Supervisor Special Investigations Staff Special Investigations Supervisor System Administrator

2.1.6 Page Mapping

Add page mapping for the Coversheet Generation page.

2.1.7 Page Usage/Data Volume Impacts

Expected volume usage is 450,000 clicks per month.

2.2 Case Summary

2.2.1 Overview

Update the Case Summary page in the LRS System. Add a Generate Coversheet button to the Case Summary page in order to create a coversheet for the case that the worker is on.

2.2.2 Case Summary Mockup

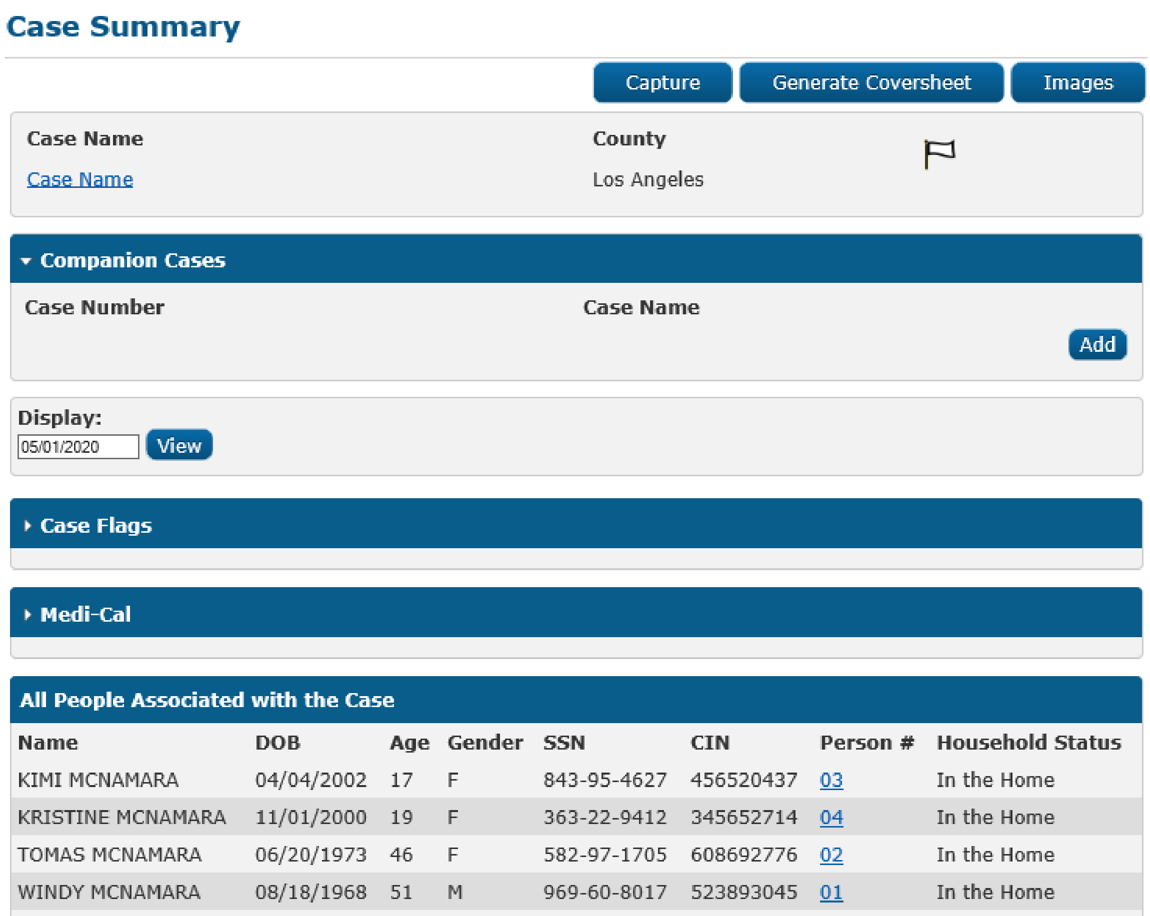


Figure 2.1.1 – Case Summary

2.2.3 Description of Changes

1. Generate Coversheet Button – Clicking the Generate Coversheet button will generate a barcoded pdf page for the case that the worker is on. The barcoded PDF page will be shown in one adobe pop up window for the worker to print from. This barcode will have the case number's associated sequence placed into the barcode. This feature will only be available when the county is set to use this solution. This functionality is only available when the worker has the security right of "ImagingCapture".

Note: "Capture" and "Images" buttons will be added into the LRS/CalSAWS system through separate SCRs.

2.2.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Case Summary**

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingCapture	Imaging Scan	Imaging Capture

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Capture	Scan documents for a case using the imaging application.	Child Care Staff Child Care Supervisor Clerical Staff Clerical Supervisor Collections Staff Eligibility Staff Eligibility Supervisor Employment Services Contracted Staff Employment Services Contracted Supervisor Employment Services Staff Employment Services Supervisor Executive Fiscal Staff

Security Group	Group Description	Group to Role Mapping
		Fiscal Supervisor Hearings Staff Hearings Supervisor Help Desk Staff Marketing Staff Marketing Supervisor Quality Assurance Staff Quality Assurance Supervisor Quality Control Staff Quality Control Supervisor RDB Staff RDB Supervisor Special Investigations Staff Special Investigations Supervisor System Administrator

2.2.6 Page Mapping

~~Add page mapping for the Case Summary page.~~

2.2.7 Page Usage/Data Volume Impacts

The estimated projected clicks per month is 45,000.

2.3 Add Separator and Coversheets

2.3.1 Overview

There is currently no barcoded coversheet for a case and No Case Identified Coversheet available in the system. There is also no centralized access point to access the Generic Separator Sheet. To meet the requirements, a barcoded coversheet must be created. Additionally, a No Case Identified Coversheet and a Generic Separator Sheet must be added to the template repository.

2.3.2 Create Barcoded Coversheet Separator Form XDP

Form Header: NA
Form Title: Imaging Case Coversheet
Imaging Form Name: Imaging Case Coversheet
Form Number: IMG 100
Include NA Back 9: NA
Form Mockups/Examples: See Supporting Documents

Languages:
English

2.3.3 Description of Change

1. Add barcoded coversheet that is generated from the case numbers submitted by the worker.

   Note: This document will not be viewable in the template repository.

2.3.4 Add Form Variable Population

Case Number and Case Name will be generated onto each coversheet that is generated.

Form Body Variables:

Variable Name	Population	Formatting	Template Repository Population	Populates with Form Generation
<Barcode>	Generate 2D barcode with the value of: AAAAAAA<County Code><Case Serial Number> EX: AAAAAAA02LOD1318	Barcode	No	Yes
<Case Number>	The Case Number	Arial, size 20, bold	No	Yes
<Case Name>	The Case Name associated to the case. If the Case is confidential then the Case Name will be displayed as "Confidential".	Arial, size 20, bold	No	Yes

Note: The Form Title is Arial, size 20.

2.4 Add Generic Separator Sheet to Template Repository

2.4.1 Overview

This recommendation will add the Generic Separator Sheet to the Template Repository.

State Form: N/A, this is an Imaging specific document
Programs: N/A
Attached Forms: N/A
Forms Category: Form

Languages:
English

2.4.2 Description of Change

2.4.2.1 Document Parameters Page Mockup

Figure 2.4 – Document Parameter

1. Language – The Language drop down will only have English as an available option.

2.4.2.2 Create XDP Generic Separator Sheet

A new XDP will be created for the Separator Sheet. There will be no variable population.

Form Header: N/A
Form Title: Imaging Separator Coversheet
Imaging Form Name: Imaging Separator Coversheet
Form Number: IMG 101
Include NA Back 9: No
Form Mockups/Examples: See Supporting Documents #1

2.4.2.3 Add Form Control for Generic Separator Sheet

No Imaging barcode needs to be added for the Separator sheet.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	No

2.4.2.4 Add Generic Separator Sheet to Template Repository

Add the Generic Separator Sheet to the Template Repository.

Required Document Parameters: Language

The following are the print requirements for the Generic Separator Sheet.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
No	No	No	No	No	No

Mailing Requirements:
Mail-To (Recipient): N/A
Mailed From (Return): N/A
Mail-back-to Address: N/A
Outgoing Envelope Type: N/A
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No
Post to YBN/C4Y: No

2.5 Add Imaging No Case Coversheet to Template Repository

2.5.1 Overview

This recommendation will add the Imaging No Case Coversheet to the Template Repository.

State Form: N/A, this is an Imaging specific document
Programs: N/A
Attached Forms: N/A
Forms Category: Form

Languages:
English

2.5.2 Description of Change

2.5.2.1 Document Parameters Page Mockup

Figure 2.5 – Document Parameter

1. Language – The Language drop down will only have English as an available option.

2.5.2.2 Create XDP Imaging No Case Coversheet

A new XDP will be created for the Imaging No Case Coversheet.

Form Header: N/A
Form Title: Imaging No Case Coversheet
Imaging Form Name; Imaging No Case Coversheet
Form Number: IMG 102
Include NA Back 9: No
Form Mockups/Examples: See Supporting Documents #1

2.5.2.3 Add Form Control for Imaging No Case Coversheet

Do not add an Imaging barcode for the Imaging No Case Coversheet.

Tracking Barcode	BRM Barcode	Imaging Barcode
No	No	No

2.5.1.4 Add Imaging No Case Identified to Template Repository

Add the Imaging No Case Identified Separator Sheet to the Template Repository.

Required Document Parameters: Language

The following are the print requirements for the Imaging No Case Identified Separator Sheet.

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
No	No	No	No	No	No

Mailing Requirements:
Mail-To (Recipient): N/A
Mailed From (Return): N/A
Mail-back-to Address: N/A
Outgoing Envelope Type: N/A
Return Envelope Type: None

Additional Requirements:
Special Paper Stock: N/A
Enclosures: N/A
Electronic Signature: No
Post to YBN/C4Y: No

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	Mockup of a barcoded coversheet	Imaging Case Coversheet Mockup
2	Correspondence	Generic Separator Sheet	Imaging Separator Coversheet Mockup
3	Correspondence	No Case Coversheet Mockup	Imaging No Case Coversheet Mockup
4	Correspondence	Mockup of multiple barcoded coversheets.	Imaging Multi Case Coversheet Mockup
5	Security	Security Matrix.	Security Matrix

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2503	The CONTRACTOR shall configure the imaging solution to allow the following documents to act as separators for the capture and indexing multi-case scan mode and returned mail multi-case scan mode: 1) Cover Sheets - Will contain a barcode with a case number or a no case identifier 2) System Generated Barcoded Documents The CONTRACTOR shall configure the imaging solution to allow the optional use of generic separator sheets for all scan modes to assist in separating documents. The CONTRACTOR shall configure the imaging solution to allow the optional use of envelopes as separator sheets for the returned mail multi-case scan mode.	None	This page creates the coversheets needed to separate during multi-case scan mode.

CalSAWS

California Statewide Automated Welfare System

Design Document

SCR 214037 – Update Distributed Documents Page

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sarah Steimle
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/18/2020	1.0	Initial	Sarah Steimle
9/14/2020	2.0	Updated Security Right and Security Group name from ImagingViewCase to ImagingSearchCase	Erika Kusnadi-Cerezo
12/9/2020	3.0	Content Revision 2: - Restructured Image button specifications for clarity and added 'ImagingSearchPerson' right - Include scan date range for document 'Images' display - Updated the Group to Role mapping for both Imaging Search Person and Imaging Search Case and the Group Description for both Imaging Search Person and Imaging Search Case. - Added assumption that a worker will be able to re-index their images within Hyland	Gillian Noelle Bendicio Erika Kusnadi-Cerezo
12/16/2020	4.0	Content Revision 2: - Added a note to section 2.1.31b for what documents need to be pulled upon clicking the Images button	Erika Kusnadi-Cerezo
12/17/2020	5.0	Content Revision 2: - Added additional criteria that users also need to have proper security rights in order to see the Images Button. - Added reference to Supporting Document#3 for a list of Case/Person level documents - Added to the Supporting Document, the Imaging Form	Erika Kusnadi-Cerezo

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
		Name Master list for the list of Person/Case level Documents - Removed Page Mapping Requirement.	
01/06/2021	5.1	Design Clarification: Updated on Section 2.1.3 date range for non-time sensitive doc is from the scan date not system date. Removed references to tracked and non-tracked as they are a subset of the time sensitive and non-time sensitive documents respectively.	Erika Kusnadi-Cerezo Gillian Noelle Bendicio

Table of Contents

1 OVERVIEW

This SCR will be implementing an Images button to give the user the functionality to find documents associated to the documents listed in the Distributed Documents page based on specified search criteria. This SCR will also be updating the expandable plus button on the page to have more contrast and this SCR will be updating the "Details" link to be a "Details" button.

1.1 Current Design

In LRS today there is no functionality in the system that is able to view documents associated to listed documents in the Distributed Documents page. Additionally, The Distributed Documents page has an expandable plus button that does not have enough contrast and the Distributed Documents page has a "Details" link that, when clicked, shows the worker the details of the associated form.

1.2 Requests

The request is to add functionality for the user to be able to view documents that are associated to another document on the Distributed Documents page in the LRS/CalSAWS system based on specified search criteria. The second request is to update the expandable plus button to have more contrast. The third request is to make the "Details" link a button.

1.3 Overview of Recommendations

1. Add an Images button to the Distributed Documents page to be able to view the associated documents to the documents that are listed on the page.
2. Update the expandable plus button on the Distributed Documents page to have more contrast.
3. Update the "Details" link on the Distributed Documents page to be a button.

1.4 Assumptions

1. The Imaging system has the functionality to search for the specified criteria.
2. Fields not mentioned in the Description of Changes sections, will not be updated.
3. SCR CA-214032 will provide the necessary webservice to mark the Scan_IND as "Y".
4. Routing of barcoded documents when a barcode is not read is explained in SCR CA-214058 (Environment Workflow Configuration).
5. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).
6. Hyland counties can reindex any document to case or person level after the documents have been automatically indexed.

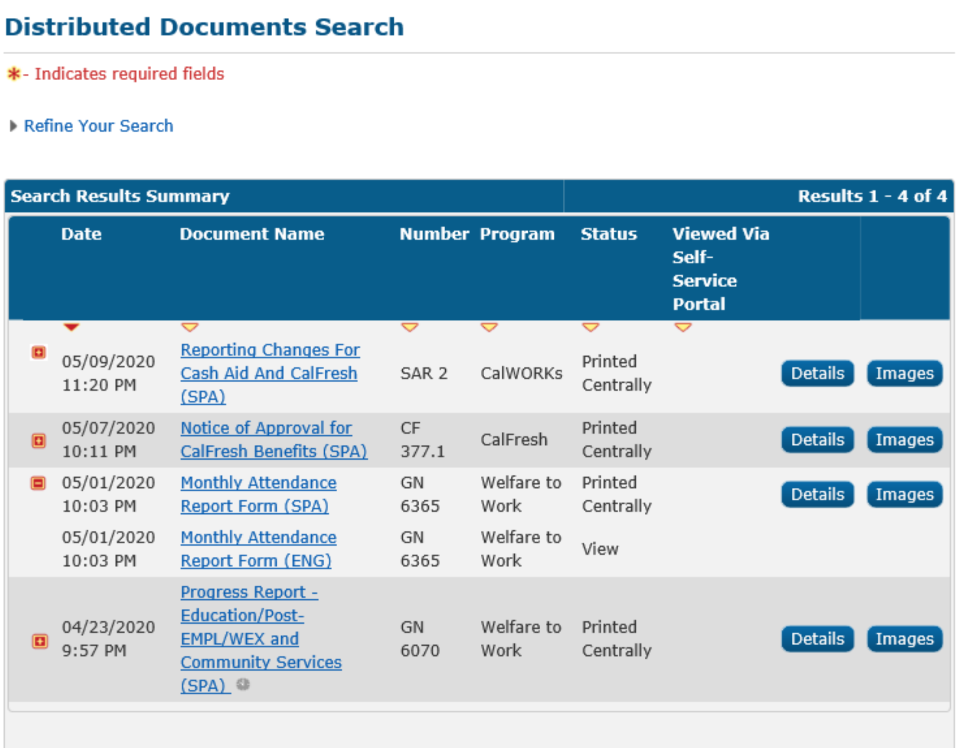
2 RECOMMENDATIONS

2.1 Distributed Documents page

2.1.1 Overview

The Distributed Documents page lists the documents that have been generated for the case that the worker is on. The page needs to be updated to provide functionality for the worker to be able to view documents associated to the documents listed on the page. This page also needs to have the expandable plus sign updated to have more contrast between the colors to be ADA compliant and the "Details" link needs to be updated to be a button.

2.1.2 Distributed Documents Mockup


Distributed Documents Search

*- Indicates required fields

Refine Your Search

Search Results Summary — Results 1 - 4 of 4

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal		
05/09/2020 11:20 PM	Reporting Changes For Cash Aid And CalFresh (SPA)	SAR 2	CalWORKs	Printed Centrally		Details	Images
05/07/2020 10:11 PM	Notice of Approval for CalFresh Benefits (SPA)	CF 377.1	CalFresh	Printed Centrally		Details	Images
05/01/2020 10:03 PM	Monthly Attendance Report Form (SPA)	GN 6365	Welfare to Work	Printed Centrally		Details	Images
05/01/2020 10:03 PM	Monthly Attendance Report Form (ENG)	GN 6365	Welfare to Work	View			
04/23/2020 9:57 PM	Progress Report - Education/Post-EMPL/WEX and Community Services (SPA)	GN 6070	Welfare to Work	Printed Centrally		Details	Images

Figure 2.1.1 – Distributed Documents Page

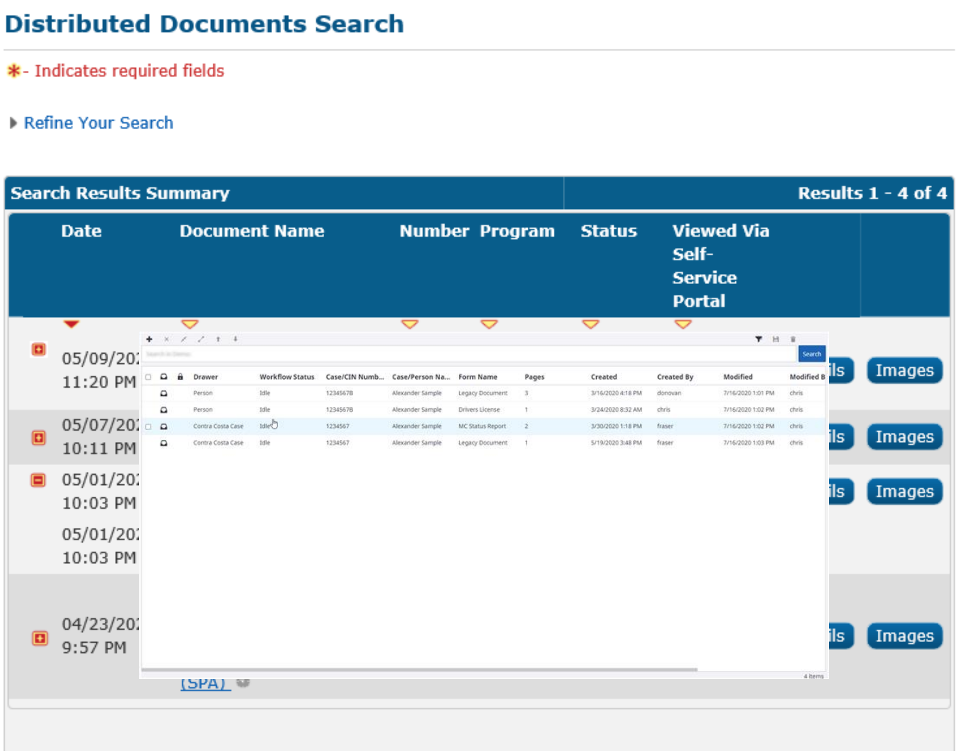


Figure 2.1.2 - Hyland Pop Up from Images Button Mockup

2.1.3 Description of Changes

1. Images Button – The Images button will display if the user have the security right of "ImagingSearchCase" and/or "ImagingSearchPerson" and the generated documents that have been marked by the 'Mark Document Received Inbound' web service as scanned and data will be in the generate doc table. When the Images button is clicked, the Images button will display a list of documents in a pop up from Hyland (Imaging Solution) that are associated to the document that is listed in the Document Name column of the Distributed Documents page. In order to view Images from the Images buttons on this page the user must have the security right "ImagingSearchCase" and/or "ImagingSearchPerson" (Please reference Supporting Document#3: CalSAWS Imaging Document Types and Form Names for a list of Case level documents/Person level documents).

   The 'Images' button supports 2 types of documents:

   a. Non-time sensitive ~~or non-tracked~~
      i. The Document Type search criteria for all non-time sensitive ~~or non-tracked~~ documents is:
         1. Address/Residency
         2. Appointment Letter
         3. Customer/Worker Contact

4. Child Support
5. Veterans
6. Interoffice Correspondence
7. Notification/NOA
8. Sworn Statements
9. Verification Requests
10. Personal Expenses
11. Customer Verification Forms
12. Overpayment/Overissuance (OP/OI)

ii. The date range for non-time sensitive ~~or non-tracked~~ documents is 90 days from the ~~LRS/CalSAWS system~~ scan date.

b. Time sensitive ~~or tracked~~

i. The search criteria for time sensitive ~~or tracked~~ documents is specified in Supporting Document #1: Specific Search Criteria. The document specifies the Form Number, Form Name, Document Type(s), and Scan Date Range. The Document Type(s) column defines what Document Type(s) will be searched for when the Images button is clicked for the associated Form. The Date Range column defines the date range in which the system will search for the Document Type(s).
Note: Upon clicking the Images button all associated forms/documents will be pulled including actual time sensitive~~/tracked~~ documents.

2. Details Button – Currently the Distributed Documents page has a "Details" link. This link will be updated to a button.
3. Plus Button – Currently the Distributed Documents page has a plus button. This button will be updated to the displayed colors of red and yellow.

Note: This feature and corresponding security rights will only be available when the county is enabled on the CalSAWS Imaging Solution (Hyland).

2.1.4 Page Location

Global: Client Correspondence

Local: Distributed Documents

Task: NA

2.1.5 Security Updates

<u>Security Rights</u>

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Imaging Search Case
ImagingSearchPerson	Allows view and search access to person drawer documents.	Imaging Search Person

Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Case	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, ~~Marketing Supervisor~~, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, ~~RDB Supervisor~~, Special Investigations Supervisor, CA state All County Access, Child Care Staff, Clerical Staff, Eligibility Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Executive, Hearings Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Control Staff, Regional Call Center Staff, Special Staff

Security Group	Group Description	Group to Role Mapping
Imaging Search Person	Allows view and search access to person drawer documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, Special Investigations Supervisor, CA state All County Access, Child Care Staff, Clerical Staff, Eligibility Staff, Employment Services Contracted Staff, Employment Services Contracted Supervisor, Employment Services Staff, Executive, Hearings Staff, Oversight Agency Staff, Quality Assurance Staff, Quality Control Staff, Regional Call Center Staff, Special Staff, Collections Staff, Fiscal Staff

2.1.6 Page Mapping

~~Update page mappings on the Distributed Documents page.~~

2.1.7 Page Usage/Data Volume Impacts

There is no performance concerns.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online	Document of specific search criteria for each ~~tracked~~ or time sensitive document.	Specific Search Criteria Specific Search Criteria.xlsx
2	Security	This is the security matrix.	Security Matrix SCR 214037 Security Matrix Content Revisi
3	Imaging	CalSAWS Imaging Document Types and Form Names	Imaging Doc Types-Form Names CA-214037

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
	DDID 2507 Updated Requirement Text: The CONTRACTOR shall configure the Distributed Documents Search page in the CalSAWS Software to include additional links. When the link is clicked, the system generated document (captured) will return from the imaging solution with a list of image(s)/document(s) that meet the specific search criteria for that system generated document (if applicable).The CONTRACTOR shall configure the link to have unique search criteria for each of the time sensitive/tracked system generated documents. All other system generated documents will default to the same generic search criteria. **DDID 2507 Original Requirement Text:** The CONTRACTOR shall configure the Distributed Documents Search page in the CalSAWS Software to create a "+" sign next to system generated document(s). The "+" expands to provide a link to the document when it is scanned into the imaging solution. When the link is clicked, the system generated document (captured) will return from the imaging solution with a list of image(s)/document(s) that meet the specific search criteria for that system generated document (if applicable).The CONTRACTOR shall configure the link to have unique search criteria for each of the time sensitive/tracked system generated documents. All other system generated documents will default to the same generic search criteria. The search criteria will be determined during detailed design.	Please refer to Exhibit Z, schedule 1 for contractor assumptions.	Requirement is met by adding an Images button to the Distributed Documents page where the user can click on the button and see the associated images based on the search criteria for the associated documents.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214038

Add Images Buttons

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Sarah Steimle
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/6/2020	1.0	First Review	Sarah Steimle
9/14/2020	2.0	Updated Security Rights and Security Group name from ImagingViewPerson to ImagingSearchPerson & ImagingViewCase to ImagingSearchCase	Erika Kusnadi-Cerezo
10/8/2020	3.0	Design Clarification – Remove Filter ID for Hyland parameters	Gillian Noelle Bendicio
11/11/2020	4.0	Design Clarification – Updated to Section 2.3.3 that the new imaging button will only be for Counties that are on the Hyland solution. For Counties that are on Hyland the Images and DCFS Images button will be hidden. For Counties that are not on Hyland Images and DCFS Images button will continue to display and function the same way	Erika Kusnadi-Cerezo
12/2/2020	4.5	Content Revision: Updated Specific Search Criteria document	Gillian Noelle Bendicio
12/9/2020	5.0	Content Revision: - Updated the Security Right and Group Description in Section 2.1.5, 2.2.5, and 2.3.5 - Added assumption for E-Application Detail when it is not linked to a case - Added assumption for the Special Investigation Detail page for passing case numbers - Added the security rights for RDB Detail pages and Special Investigation Detail	Erika Kusnadi-Cerezo Gillian Noelle Bendicio
01/4/2020	5.1	Remove Page Mapping requirement from Section 2.2.6 and 2.3.6	Erika Kusnadi-Cerezo
1/7/2020	5.2	Remove from Section 2.3.3 the statement about date range of this search… since it's not applicable .	Erika Kusnadi-Cerezo

Table of Contents

1 OVERVIEW

This SCR will be adding Images buttons to the specified pages in the LRS/CalSAWS system in order to pull back documents that are specific to the page and case the worker is on. This SCR will also be updating the Point of Service Images list to be migrated into the Imaging Solution. This SCR will update the Utility Navigation bar Images button to display a pop-up from Hyland that will land the user on the Hyland Home page to begin the Imaging Workflow and will remove the DCFS Images button.

1.1 Current Design

Currently, there are limited Images buttons in the LRS/CalSAWS system. Currently, the Point of Service Images List page displays the Images received for the case the worker is on. Currently, the Utility Navigation Images button displays the Images associated to the case and the DCFS Images button gives the user access to DCFS images.

1.2 Requests

The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system. The following request is to migrate the Point of Service Images List page to the Imaging Solution (Hyland). The Next request is for this SCR is to update the utility Navigation Images button to have a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland Home page to begin the Imaging Workflow and to remove the DCFS images button.

1.3 Overview of Recommendations

1. The request is for the worker to be able to see documents associated to the case and page they are on in the LRS/CalSAWS system.
2. The request is to migrate the Point of Service Images List page into Hyland.
3. The request is to update the Utility Navigation Images button to display a pop up from the Imaging Solution (Hyland) that will land the worker on the Hyland page to begin the Imaging Workflow when clicked.
4. The request is to remove the DCFS images button from the Utility Navigation bar.

1.4 Assumptions

1. The predefined Imaging filters that these pages depend on will be implemented on the same release.

2. Fields not mentioned in the Description of Changes sections, will not be updated.
3. Functionality will not be available to counties that have not been enabled on the new imaging solution (Hyland).
4. The Hyland mockups are currently in draft and minor updates may be required.
5. CA-214051 DDID 2513 - E-Application Metadata will be implementing functionality for application level documents to be viewable in the E-Application Detail page when the application has not been linked to a case.
6. The Special Investigation Detail page will only pass information supported by the Hyland solution. The Hyland solution is able to accept the internal CalSAWS case number.

2 RECOMMENDATIONS

2.1 Add Images Buttons

2.1.1 Overview

Currently, in LRS/CalSAWS there are limited Images buttons. This SCR will implement Images button on the specified pages found in Supporting Document #1. The following are some examples.

2.1.2 Example Mockups

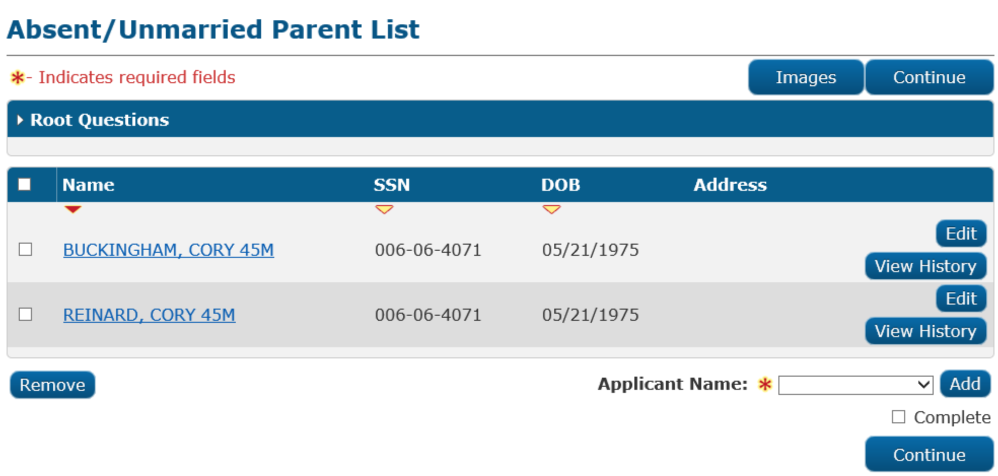


Figure 2.1.1 – Absent/Unmarried Parent List

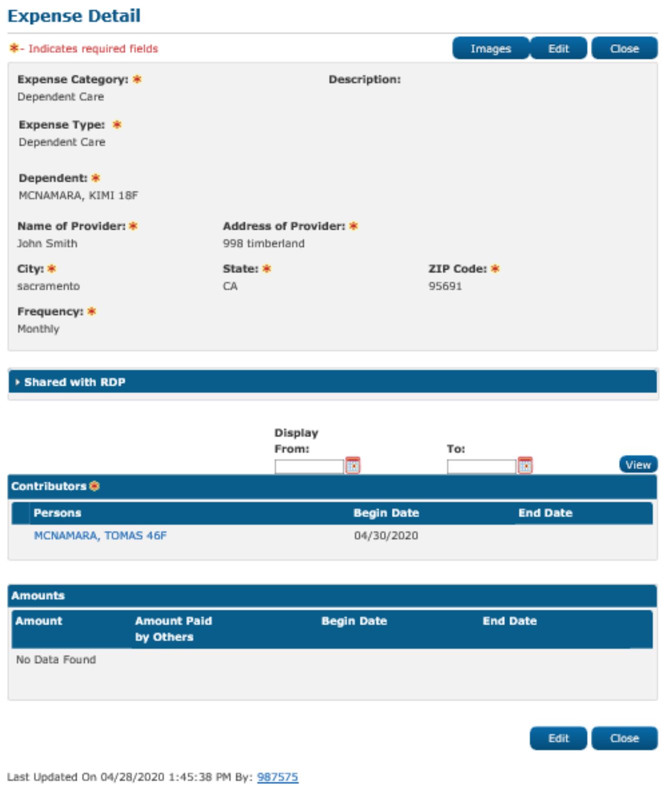


Figure 2.1.2 – Expense Detail

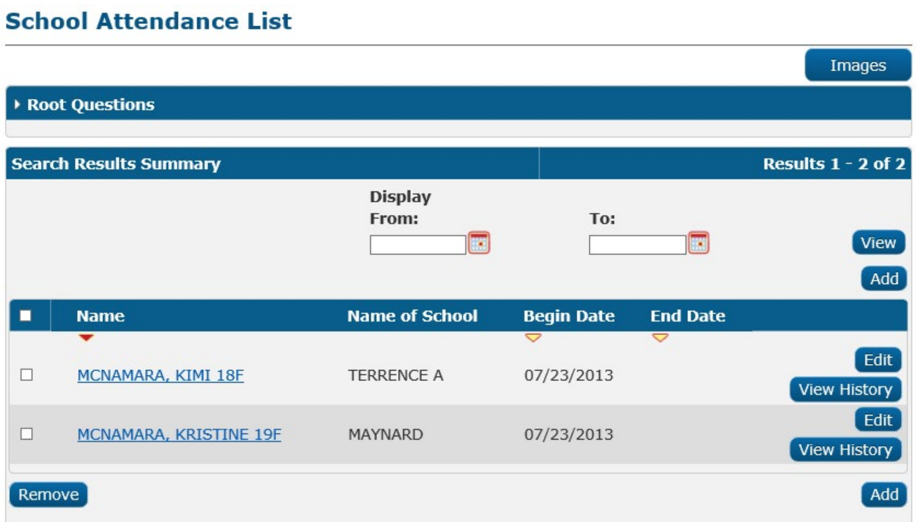
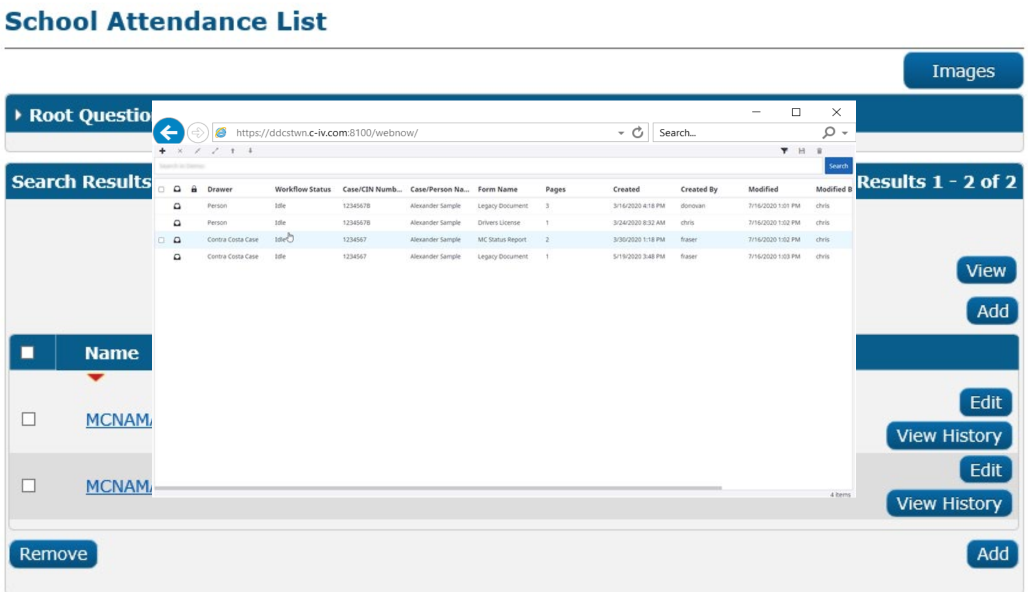


Figure 2.1.3 – School Attendance List



imag

Figure 2.1.4 – Hyland Pop Up Mockup

2.1.3 Description of Changes

1. Images – When clicked the Images button will search for the specified criteria in the Specific Search Criteria excel spreadsheet (Supporting Document #1) and will display a pop up from the Imaging Solution (Hyland) that is 850 pixels tall and 1500 pixels wide. The "Images" button will go to the left of any other buttons that are already on the pages directly below the page title (For build reference, in the top Button Container). Pages in LRS that already have an Images button or "View Images" button will be updated to "Images" and will utilize the specific search criteria and defined parameters to create the URL to Hyland. The Specific Search Criteria lists: LRS Page, Imaging Document View, Level of Document Retrieved, Security, CalSAWS Doc Types, and CalSAWS Form Names(Tab1 is for pages that do not have a button in LRS/CalSAWS already and tab 2 is for LRS/CalSAWS pages that already have an Images button on the page).
    a. The column "LRS Page" is the column that lists the pages in LRS/CalSAWS that need an Images button added to it.
    b. The "Level of Document Retrieved" lists the level of document retrieval associated to the page.
    c. The column "Security" lists the security right the user needs to be able to see the "Images" button on the page.
    d. The column "CalSAWS Doc Types" lists the document types that need to be searched for when the Images button is clicked on the associated page.

e. The "CalSAWS Form Names" lists the "Form Names" that need to be searched for when the Images button is clicked on the associated page.

The parameters that must be sent to Hyland for Person level Document Retrieval is:

a. All Person(s) UID
b. View ID

The parameters that must be sent to Hyland for Case Level Document Retrieval are:

a. Case UID
b. View ID

The parameters that must be sent to Hyland when the document retrieval is either "Case or Person" level documents are:

a. Case UID
b. All Persons UID
c. View ID

The parameters that must be sent to Hyland when the document retrieval is "Resource" are:

a. View ID
b. Org ID

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). Additionally, no documents past 365 days old and no more than 500 documents will be listed in the Hyland pop-up.

2.1.4 Page Location

- **NA**

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingSearchPerson	Allows view and search access to person drawer documents.	Imaging Search Person
ImagingSearchCase	Allows view and search access to the user's county case	Imaging Search Case

Security Right	Right Description	Right to Group Mapping
	drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Person	Allows view and search access to person drawer documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor
Imaging Search Case	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

NA

2.1.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

2.2 Update Point of Service Images List Page

2.2.1 Overview

Currently, in LRS/CalSAWS the Point of Service task navigation item directs the user to the Point of Service page where images that have been received for the case the worker is on are listed.

2.2.2 Example Mockups

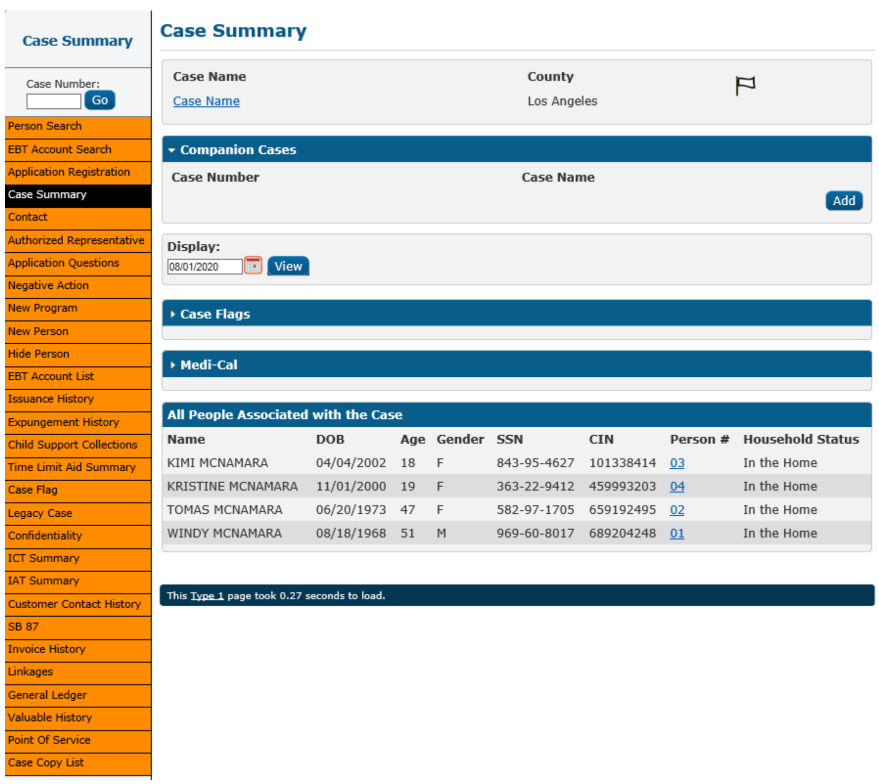


Figure 2.1.1 – Point of Service Images Task Navigation Button (Bottom Left)

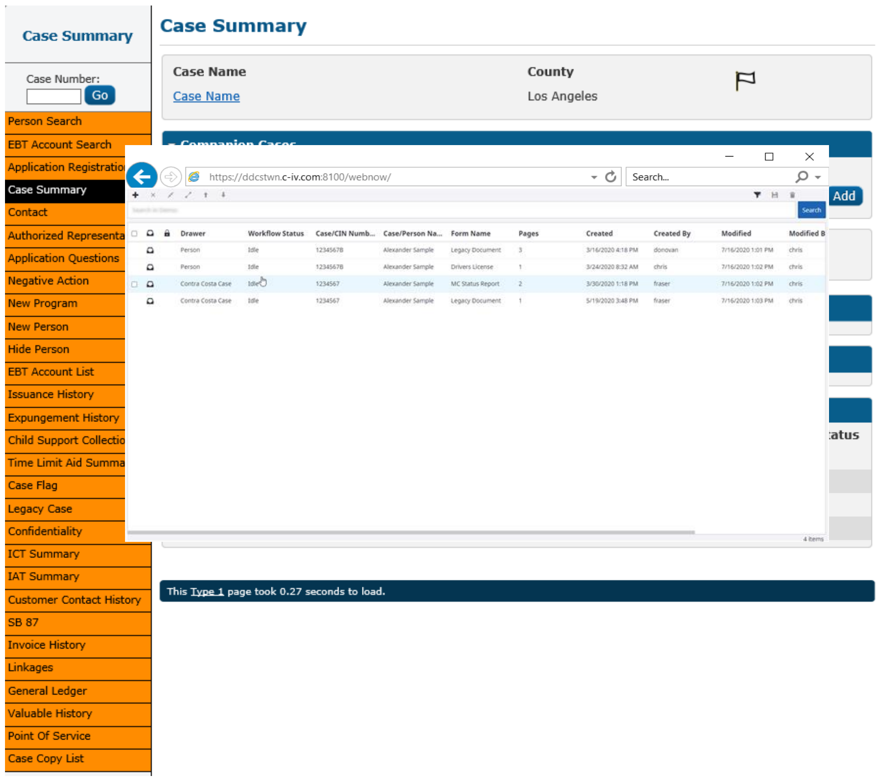


Figure 2.1.2 – Hyland Pop up Mockup

2.2.3 Description of Changes

1. "Point of Service" Task button – When clicked, this button will display a pop up from the imaging solution (Hyland). This pop up will give the user the ability to see point of service images listed which includes Kiosk/lobby, mobile app, and the statewide portal. The date range to search for the images when this button is clicked is 90 days previous to the current day. These documents will be filtered by Lobby and Kiosk source values and will search for all document types. The user must have either ImagingSearchPerson or ImagingSearchCase security rights in order to see the Point of Service Task nav item.

   Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland). The Existing Point of Service page will remain for LA County until they go live on the Hyland Solution.

2.2.4 Page Location

- **Global – Case Info**
- **Local – Case Summary**
- **Task – Point of Service**

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Imaging Search Case
ImagingSearchPerson	Allows view and search access to person drawer documents.	Imaging Search Person

4. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging Search Case	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special

Security Group	Group Description	Group to Role Mapping
		Investigations Supervisor
Imaging Search Person	Allows view and search access to person drawer documents.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

2.2.6 Page Mapping

~~Update Page Mapping for the Case Summary page.~~

2.2.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

2.3 Update Utility Navigation Images Buttons

2.3.1 Overview

Currently, in LRS/CalSAWS the Utility Navigation Images Button displays the images associated to the case the user is on. Currently the DCFS Images button displays DCFS Images.

2.3.2 Example Mockups

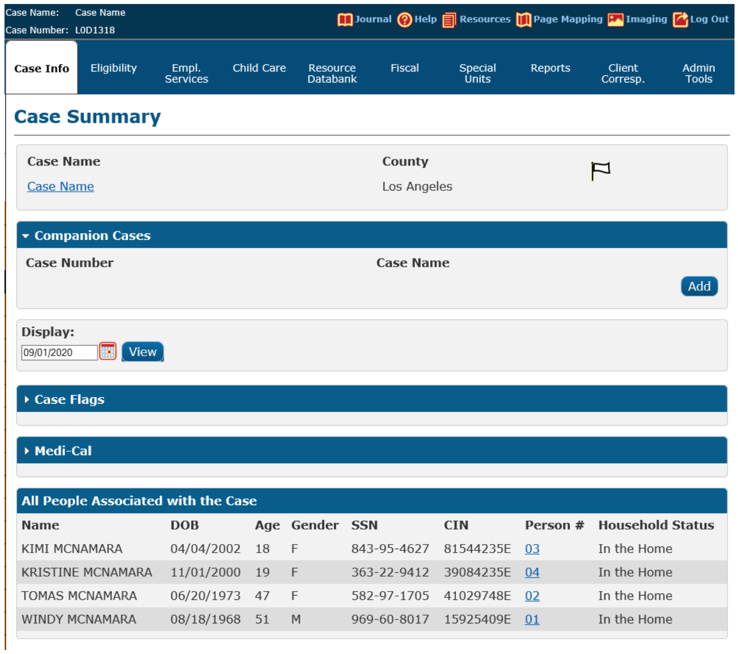


Figure 2.1.1 – Utility Navigation Images Buttons Updated

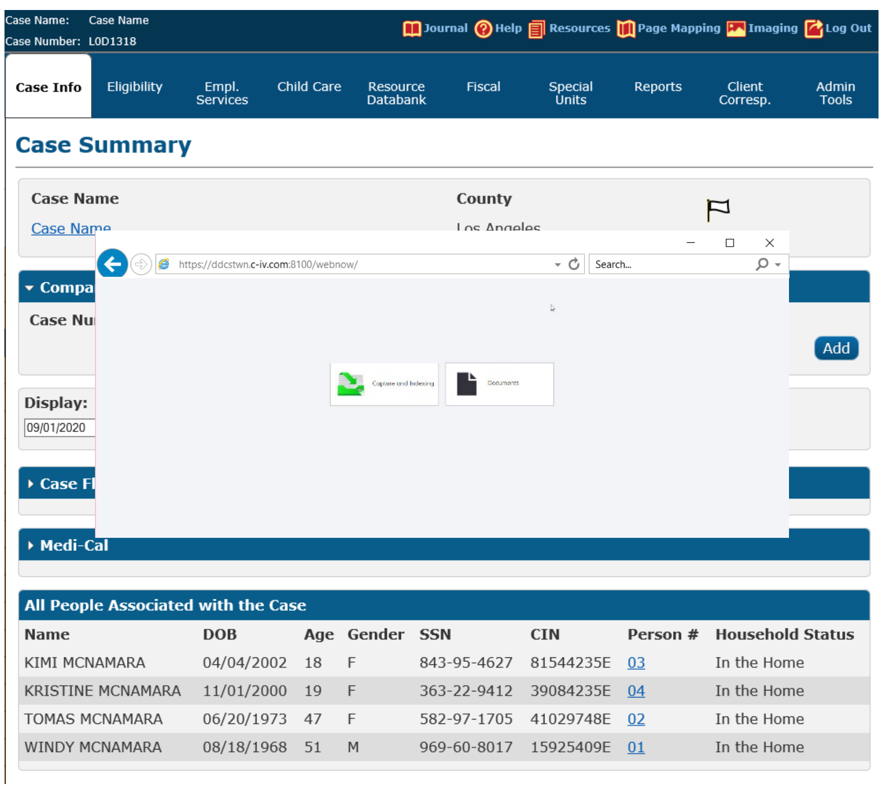


Figure 2.1.2 – Utility Navigation Images Button Hyland pop up (When "Imaging" is clicked)

2.3.3 Description of Changes

1. Utility Navigation Imaging Button – This will display for Counties that are on the Hyland Imaging Solution. When clicked this button will display the Perceptive Experience Home Page from the Imaging Solution (Hyland) at all times. ~~The date range of this search is 365 days and the maximum amount of documents that can be listed is 500.~~ The Security right the user needs to have in order to be able to view this button is "ImagingSearchCase". The 'Imaging' button will display
2. DCFS Images – This button will be hidden for Counties that are on the new Hyland imaging solution.
3. Images – This button will be hidden for Counties that are on the new Hyland imaging solution.

Note: These changes will not be available to counties that have not been enabled on the new imaging solution (Hyland).

For Counties that are not on the new imaging solution (Hyland) both the DCFS Images button and the Images button on the Utility Navigation will continue to display and will continue to function as it currently is.

2.3.4 Page Location

- **Global – NA**
- **Local - NA**
- **Task - NA**

2.3.5 Security Updates

Security Right	Right Description	Right to Group Mapping
ImagingSearchCase	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view	Image Search Case

Security Right	Right Description	Right to Group Mapping
	confidential documents via the case summary screen.	

1. Security Groups

Security Group	Group Description	Group to Role Mapping
Image Search Case	Allows view and search access to the user's county case drawer documents. Additionally, enables users with the required confidential security rights to view confidential documents via the case summary screen.	Child Care Supervisor, Clerical Supervisor, Eligibility Supervisor, Employment Services Supervisor, Fiscal Supervisor, Hearings supervisor, Marketing Supervisor, Quality Assurance Supervisor, Quality Control Supervisor, Regional Call Center Supervisor, RDB Supervisor, Special Investigations Supervisor

2.3.6 Page Mapping

~~Update Page Mapping for the Utility Navigation Images button.~~

2.3.7 Page Usage/Data Volume Impacts

There are no expected performance concerns.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

1	Online	This document specifies what pages need an "Images" button added to it, the Document View, the Level of Document Retrieval, the security, the CalSAWS Doc Types, and the CalSAWS Form Names.	Specific Search Criteria
2	Security	Security Matrix	Security Matrix
3	Online	Folder that contains mockups of all pages that need to be updated.	Mockup Folder

4 REQUIREMENTS

4.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2508	The CONTRACTOR shall add all images buttons from the LRS and C-IV Application pages to the CalSAWS Software. The images buttons will display the same images/documents that are currently returned from the LRS and C-IV Applications.	Please refer to Exhibit Z, schedule 1 for contractor assumptions.	Adding all images buttons to the system.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214049

Confidential Security for Case Level Documents

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Kim
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
8/14/20	1.0	Initial Draft	Jennifer Kim
1/5/2021	2.0	Content Revision: Remove Page Mapping requirement from Section 2.1.6	Erika Kusnadi-Cerezo
1/8/2021	3.0	Design Clarification: Add Confidential custom property into the API request parameters.	Howard Suksanti

Table of Contents

1 OVERVIEW

The CalSAWS Imaging System requires that CalSAWS updates case confidentiality in the imaging system. The imaging system categorizes case confidentiality via two different drawer types (Case or Confidential Drawer).

Case-level documents belong to a **Confidential Drawer** in the imaging system if they are associated to a case with one or more currently effective confidentiality records in CalSAWS. Case-level documents belong to a **Case Drawer** in the imaging system if they are not associated to a case with a currently effective confidentiality record in CalSAWS.

This SCR will invoke two outbound web services to search for and move case-level documents to their correct drawer in the imaging system: Search Image and Re-index Image Outbound Web Services. This SCR is only responsible for invoking both web services, as **SCR CA-214055** and **SCR CA-214039** already created web service designs for Search Image and Re-index Image Web Services respectively.

1.1 Current Design

There are currently no established web services between the CalSAWS Imaging System and CalSAWS to update case confidentiality in the imaging system.

1.2 Requests

1. Modify the CalSAWS Confidentiality Detail Page to update case confidentiality in the CalSAWS Imaging System.
2. Modify the FC Linked Case Transactions Batch Job (PI19C884) to update case confidentiality in the imaging system.

1.3 Overview of Recommendations

1. Modify the CalSAWS Confidentiality Detail Page to update case confidentiality in the CalSAWS Imaging System by invoking the Search Image and Re-index Image Web Services.
2. Modify the FC Linked Case Transactions Batch Job (PI19C884) to move case-level documents, if applicable, from the Case Drawer to the Confidential Drawer in the imaging system by invoking the Search Image and Re-index Image Web Services.
3. Provide the required fields for Search Image and Re-index Image Web Services to successfully update case confidentiality in the imaging system.

1.4 Assumptions

1. These functionalities will not be available to counties that have not been enabled on the new imaging system.

2. This SCR invokes the Search Image Outbound Web Service and Re-index Image Outbound Web Service, which were already created in SCR CA-214055 and SCR CA-214039 respectively.
3. Nightly batch PI19C882 inserts confidentiality records in CalSAWS after creating new cases for AAP Programs. However, this SCR will NOT modify this batch job to update case confidentiality in the CalSAWS Imaging System after inserting confidentiality records in CalSAWS for those newly created cases. The reason is that at the time the confidentiality records are inserted, newly created cases for AAP Programs do not exist in the imaging system.
4. Nightly batch PI19C884 inserts confidentiality records in CalSAWS after creating new cases for FC Programs and receiving linked case transactions from DCFS. However, this SCR will only modify the batch job to update case confidentiality in the CalSAWS Imaging System after inserting confidentiality records in CalSAWS for specifically, linked case transactions. At the time the confidentiality records are inserted for newly created cases for FC Programs, such cases do not exist in the imaging system.

2 RECOMMENDATIONS

2.1 Confidentiality Detail Page

2.1.1 Overview

The Confidentiality Detail page can remove, add, and edit case confidentiality. This page will be updated to utilize new web services (Search Image and Re-Index Image Web Services).

2.1.2 Confidentiality Detail Mockup

Figure 2.1.1 – Confidentiality Detail Page

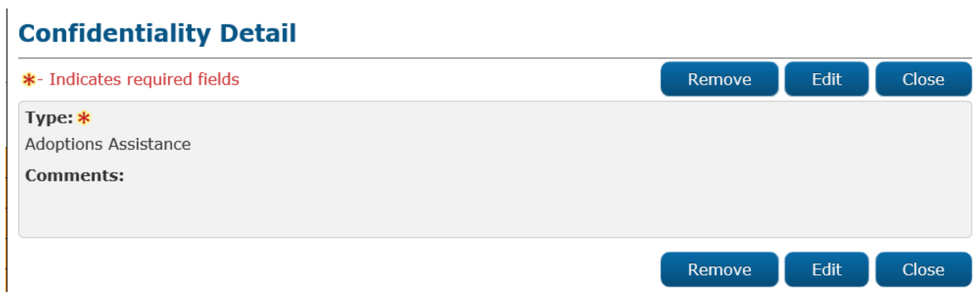


Figure 2.1.2 Confidentiality Detail Page (Additional Buttons)

2.1.3 Description of Changes

1. When the worker clicks the following buttons, invoke the Search Image Web Service:
    a. 'Save and Return'
    b. 'Remove'
2. If the click of the 'Save and Return' button creates a new CONFID record as of the system date in CalSAWS, engage in the following:
    a. Search in the Imaging System's Case Drawer when invoking the Search Image Web Service. Please refer to the table "Search Image Request Parameters" for additional details.

   b. If the Search Image Web Service does not return any results, do not take any further actions. An empty result means that there are no case-level documents that need to be moved to the Confidential Drawer.
   c. If the Search Image Web Service returns results, invoke the Re-index Image Web Service to move case-level documents from the Case Drawer to the Confidential Drawer. Please refer to the table "Search Image Response Parameters" to look up all the required values to successfully complete the Re-index Image Web Service. Please refer to the table "Re-index Image Request Parameters" for additional details.
3. If the click of the 'Save and Return' or 'Remove' button does not result in any currently effective CONFID record existing as of the system date in CalSAWS, engage in the following:
   a. Search in the imaging system's Confidential Drawer when invoking the Search Image Web Service. Please refer to the table "Search Image Request Parameters" for additional details.
   b. If the Search Image Web Service does not return any results, do not take any further actions. An empty result means that there are no confidential-level documents that need to be moved to the Case Drawer.
   c. If the Search Image Web Service returns results, invoke the Re-index Image Web Service to move case-level documents from the Confidential Drawer to the Case Drawer. Please refer to the table "Search Image Response Parameters" to look up all the required values to successfully complete the Re-index Image Web Service. Please refer to the table "Re-index Image Request Parameters" for additional details.

2.1.4 Page Location

- **Global: Case Info**
- **Local: Case Summary**
- **Task: Confidential**

2.1.5 Security Updates

There are no security updates.

2.1.6 Page Mapping

~~Update mapping on the Confidentiality Detail page.~~

2.1.7 Page Usage/Data Volume Impacts

There are no performance impacts.

2.2 Modify FC Linked Case Transactions Batch Job (PI19C884) to Update Case Confidentiality in the Imaging System

2.2.1 Overview

Nightly batch PI19C884 inserts confidentiality records in CalSAWS for existing cases after receiving linked case transactions from DCFS. Additional functionality will be added to this batch job to update case confidentiality in the imaging system when the job inserts confidentiality records in CalSAWS for those existing cases.

2.2.2 Description of Change

1. Modify the batch job to move images, if applicable, from the Case Drawer to the Confidential Drawer in the imaging system after batch job PI19C884 inserts confidentiality records in CalSAWS for FC linked case transactions:
    a. Invoke the Search Image Web Service. Search in the Imaging System's Case Drawer when invoking the web service. Please refer to the table "Search Image Request Parameters" for additional details.
    b. If the Search Image Web Service does not return any results, do not take any further actions. An empty result means that there are no case-level documents that need to be moved to the Confidential Drawer.
    c. If the Search Image Web Service returns results, invoke the Re-index Image Web Service to move case-level documents from the Case Drawer to the Confidential Drawer. Please refer to the table "Search Image Response Parameters" to look up all the required values to successfully complete the Re-index Image Web Service. Please refer to the table "Re-index Image Request Parameters" for additional details.

2.2.3 Execution Frequency

The batch job currently runs every CalSAWS business day.

2.2.4 Key Scheduling Dependencies

No Change.

2.2.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.2.6 Data Volume/Performance

Average number of 2,500 cases is processed via this nightly batch job.

2.2.7 Interface Partner

CalSAWS Imaging System.

2.2.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.3 Search Image Outbound Web Service and Re-index Image Outbound Web Service

2.3.1 Overview

This section of the SCR will disclose the required data attributes in the Search Image Web Service and Re-index Image Web Service to successfully update case confidentiality in the imaging system.

When attempting to update case confidentiality in the imaging system, the **Search Image Outbound Web Service** will first be invoked to search for and retrieve case-level documents in and from either the imaging system's Case or Confidential Drawer. The **Re-index Image Outbound Web Service,** if applicable**,** will then be invoked to move the case-level documents to their correct drawer.

2.3.2 Description of Change

1. Examine the tables "Search Image Request Parameters", "Search Image Response Parameters" and "Re-index Image Request Parameters" to evaluate all the required fields for the Search Image and Re-index Image Outbound Web Services:

Table 1 – Search Image Request Parameters

Search Image - REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
uniqueID	Long	Case Unique ID in CalSAWS.	Y
drawerName	String	1. If searching for case-level documents in the imaging system's Case Drawer, please send "${County Name} + Case". Ex. "Los Angeles Case" 2. If searching for case-level documents in the imaging system's Confidential Drawer, please send "${County Name} + Confidential".	Y

		Ex. "Los Angeles Confidential"	

Table 2 – Search Image Response Parameters

Search Image - RESPONSE			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
List of <imageInfo>			
documentId	String	Imaging system's Document ID.	Y

Table 3 – Re-index Image Request Parameters

Update Case Confidentiality: Change Drawer Type - REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
documentID	String	The imaging system Document ID. Look up the imaging system's Document ID in the table "Search Image Response Parameters".	Y
drawerName	String	1. If sending case-level documents to the imaging system's Case Drawer, please send "${County Name} + Case". Ex. "Los Angeles Case" 2. If sending case-level documents to the imaging system's Confidential Drawer, please send "${County Name} + Confidential". Ex. "Los Angeles Confidential"	Y
Confidential	Boolean	Indicates if a Case is considered Confidential in CalSAWS – Default False.	Y

Table 4 – Search Image and Re-index Web Services - FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			
400	responseCode	400	Return HTTP response code 400 if there is a tech failure because the required data attribute was not supplied.
	errorMessage	"${Field Name} Must Be Supplied."	
404	responseCode	404	Return HTTP response code 404 if the required data attribute cannot be found in the CalSAWS System.
	errorMessage	"${Field Name} Not Found."	
422	responseCode	422	Return HTTP response code 422 if there is a problem with the request for the required data attribute and the Integration Server

	errorMessage	"${Field Name} Is an Unprocessable Entity."	is unable to process it.
500	responseCode	500	Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.
	errorMessage	"Internal Server Error."	

2.3.3 Execution Frequency

The Search Image Web Service is invoked real-time. The Re-index Image Web Service is immediately invoked if the Search Image Web Service returns results.

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

CalSAWS Imaging System

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

3 MIGRATION REQUIREMENTS

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2511	The CONTRACTOR shall configure the CalSAWS Software to update the confidential security for all case level documents in the imaging solution during a nightly batch process	None	1. Modify the CalSAWS Confidentiality Detail Page to update case confidentiality in the CalSAWS Imaging System by invoking the Search Image and Re-index Image Web Services. 2. Modify the FC Linked Case Transactions Batch Job (PI19C884) to update case confidentiality in the imaging system by invoking the Search Image and Re-index Image Web Services.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214054

Get Person Info, Get Override Flags Info and Get Form Info Imaging Inbound Web Services

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Kim
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/18/20	1.0	Initial Draft	Jennifer Kim
9/3/20	2.0	Changed naming convention for security groups, roles and rights for the newly added imaging rights as part of the Get Override Flags Inbound Web Service section of the design document.	Jennifer Kim
10/5/2020	3.0	Made a design clarification to remove references to SCR CA-214038 to retrieve the list of newly created form numbers for imaging-exclusive documents.	Jennifer Kim
10/14/20	4.0	Made a design clarification to remove and add a few entries in the DOC_TEMPL_IMG table. Removed the section of the design document that requests a DBCR to add a new "Form Number" column in DOC_TEMPL_IMG.	Jennifer Kim
10/21/20	5.0	Made a design clarification to add a couple entries in the CT table for category ID 10602.	Jennifer Kim
11/24/2020	6.0	Made a design clarification to update the timesensitive field.	Howard Suksanti
12/18/2020	7.0	Update the file name of the imaging form names sheet	Howard Suksanti

Table of Contents

1 OVERVIEW

This SCR addresses three inbound web services to serve CalSAWS Data to the CalSAWS Imaging System: Get Person Info, Get Override Flags and Get Form Info Calls. The CalSAWS Imaging System leverages all three calls to receive Person information; security driven options; and both CalSAWS-generated and Imaging-exclusive form information respectively.

The Get Person Info Web Service makes a request for Person data from CalSAWS by sending request parameters that validate the request.

The Get Override Flags Web Service makes a request for security driven options from CalSAWS when the Imaging user logs into the Imaging System by sending request parameters that validate the request.

The Get Form Info Web Service makes a request for both CalSAWS-generated and Imaging-exclusive form information from CalSAWS by sending request parameters that validate the request.

1.1 Current Design

There are no established web services between the CalSAWS Imaging System and CalSAWS to request Person and Form information and security driven options from CalSAWS.

1.2 Requests

1. Create new inbound web services for the CalSAWS Imaging System to request supporting Person and Form data and security driven options from the CalSAWS System.

1.3 Overview of Recommendations

1. Create a Get Person Info Inbound Web Service to return CalSAWS Person data to the Imaging System.
2. Create a Get Override Flags Info Inbound Web Service to return CalSAWS security driven options to the Imaging System.
3. Create a Get Form Info Inbound Web Service to return CalSAWS system-generated and Imaging-Exclusive Form data to the Imaging System.

1.4 Assumptions

1. **CA-214060** will have added a new Code Category Table for the CalSAWS Imaging Type Codes. It will have added the Imaging Type Descriptions into a new code lookup table.
2. **CA-214060** will have added a new "Imaging Form Name" column to the DOC_TEMPL table. **CA-214060** will also have repurposed the existing IMG_TYPE column in the DOC_TEMPL table to refer to the new CalSAWS Imaging Type Code Category table.

3. **CA-214060** will have added a new Static Table for the CalSAWS Imaging System Document Types and Short Names. This Static Table will only store Imaging-exclusive (non-system generated) documents and will have the "Imaging Form Name" and "Imaging Document Type Code" columns.
4. Database updates within the CalSAWS System will be made to store the Imaging Form Number mappings for documents that are not yet captured in the CalSAWS System. The Imaging Team will provide the list of Form Numbers for Imaging-exclusive documents to add the new 'Imaging Form Number' column in the new Static Table for the CalSAWS Imaging System Document Types and Short Names. Refer to the "Imaging Form Name 7.23.20 Comments_12152020.xlsx" document for the list of newly created Form Number mappings for Imaging-exclusive documents.
5. The Imaging No Task Creation Override Security Right added in this design will be addressed with the document task functionality to be implemented in SCR CA-214034 (DDID 2504). Downstream task functionality will be affected by the addition of this security right in this SCR.
6. The Imaging Override No Change SAR7 QR7 Security Right will be addressed with the document task functionality to be implemented in SCR CA-214034 (DDID 2504). Downstream task functionality will be affected by the addition of this security right in this SCR.
7. This design will not be implementing retry mechanisms or addressing system outage scenarios for the inbound web services.

2 RECOMMENDATIONS

2.1 Get Person Info Inbound Web Service

2.1.1 Overview

The Imaging System invokes the Get Person Info Web Service. The request can be made in one of the following queues in the Imaging System below:

1. **Person Select Queue**- All documents categorized as person level are routed to the Person Select Queue in the Imaging System for a staff member to select the appropriate person(s) associated to the case. The Case UID is leveraged in this scenario to pull back the list of person(s). Include hidden person(s) and exclude duplicate person(s). From here, the Get Person Info Web Service will be invoked when the Imaging user selects the Person field, leveraging that Case UID, which will request the Case UID in CalSAWS to return person(s) associated to the case.
2. **Re-index Queue**- Documents that have been fully indexed may be pulled back into a Re-index Queue in the Imaging System for case or person(s) association(s) to be corrected. The Imaging user can click on a field to populate the Case Number. From here, the Get Person Info Web Service can be invoked leveraging that Case Number, which will request the

Case Number and County Code in CalSAWS to return person(s) associated to the case.

The Get Person Info Web Service requests person details from CalSAWS by sending parameters that validate the request.

2.1.2 Description of Change

1. Create a Get Person Info Web Service, in which the Imaging System requests the following Person details by sending the 'Case UID' or 'Case Number' and 'County Code' to CalSAWS:
    a. Name
    b. Person CIN
    c. Person SSN
    d. Person UID
    e. Date of Birth
2. Perform Integration Testing with the interface partner.

Table 1 – Get Person Info Request Parameters

Get Person Info – REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
Either 'caseUID' or 'caseNumber' + 'countyCode' must be sent to CalSAWS. The reason for providing an alternative set of request parameters is to fulfill a Web Service call during a re-index process where the Case UID is not available.			
caseUID	Long	Case unique ID of document being indexed in the Imaging System as a person level document.	Y
------ OR -------			
caseNumber	String (7 char.)	Case number of document being re-indexed in the Imaging System as a person level document. 7-char case SERIAL_NUM_IDENTIF	Y

countyCode	String (2 char.)	2-digit case county code of document being re-indexed in the Imaging System as a person level document.	Y

Table 2 – Get Person Info Response Parameters

Get Person Info – RESPONSE			
Data Element Name	TYPE	COMMENTS	REQUIRED
If there is more than one person associated to the case, return a list of objects. Each object should contain data information for a single person as listed below. There is no field name for both the list and object. This web service returns a JSON in the response parameters. Exclude duplicate Person(s) and include hidden Person(s) when returning Person Info in this web service. All optional values will send an empty string with the attribute name if there is no data to return.			
responseCode	HTTP Response Code 200	Return HTTP response code 200 if the call was completed successfully.	Y
name	String (40 char. Limit)	First and last name of person associated to the requested Case UID OR Case Number and County Code in CalSAWS. Instructions to concatenate first and last name values to become one value and additional instructions to truncate concatenated	Y

		values if they exceed 40 characters: 1. Concatenate first and last name values from PERS table of CalSAWS database. Add a space in between the first and last names. 2. If the concatenated value does not exceed the 40-character limit, return the results of the concatenated value as is. 3. If the concatenated value exceeds the 40-character limit, separate the concatenated values by spaces and hyphens. 4. Concatenate the first and last values after separating them accordingly. Maintain a space between the first and last values when concatenating. 5. If the new concatenated	

		value does not exceed the 40-character limit, return the results of the new concatenated value as is. 6. If the new concatenated value exceeds the 40-character limit, truncate after the 40th character of the value and take the first 40 characters as the new Name value.	
CIN	String (40 char. Limit)	Alpha-numeric Client Identification Number (CIN) associated to the Case UID OR Case Number and County Code in CalSAWS.	N
SSN	String (9 char.)	9-digit Social Security Number (SSN) associated to the Case UID OR Case Number and County Code in CalSAWS.	N
personUID	Long	Person Unique ID associated to the Case UID OR Case Number and County Code in CalSAWS.	Y
DOB	Date (Format "MM/DD/YYYY")	Date of Birth of person associated to the Case UID OR case Number and County Code in CalSAWS.	Y

		Date of Birth may be sent as a null date (i.e. 12/1/9999).	

Table 3 – Get Person Info – FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			
400	responseCode	400	Return HTTP response code 400 if there is a tech failure because the required data attribute(s) was not supplied.
	errorMessage	"${Field Name(s)} Must Be Supplied."	
404	responseCode	404	Return HTTP response code 404 if the required data attribute(s) cannot be found in the CalSAWS System.
	errorMessage	"${Field Name(s)} Not Found."	

422	responseCode	422	Return HTTP response code 422 if there is a problem with the request for the required data attribute(s) and the Integration Server is unable to process it.
	errorMessage	"${Field Name(s)} Is an Unprocessable Entity."	
500	responseCode	500	Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.
	errorMessage	"Internal Server Error."	

2.1.3 Execution Frequency

This web service is called real-time in the 'Person Select' or 'Re-Index' Queue in the Imaging System.

2.1.4 Key Scheduling Dependencies

N/A – Real Time Interface

2.1.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

CalSAWS Imaging System

2.1.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.2 Get Override Flags Inbound Web Service

2.2.1 Overview

The Get Override Flags Web Service is invoked each time the user logs into the Imaging System. The returned 'Task Override' and 'Person Override' values will determine whether the imaging user has the security rights to override task configuration and default person level documents to case level documents respectively during scanning. The returned 'No Change SAR7' value will determine whether the imaging user has the security right to mark the document as received, mark eligibility as complete and ignore task configuration during scanning.

2.2.2 Description of Change

1. Add the 'Imaging No Task Creation Override' Security Right to CalSAWS. This new security right will allow the imaging worker to ignore task configuration during scanning.
2. Add the 'Imaging Person Scope Override' Security Right to CalSAWS. This new security right will allow the imaging worker to default person level documents as case level documents during scanning.
3. Add the 'Imaging Override No Change SAR7 QR7' Security Right to CalSAWS. This new security right will allow the imaging worker to mark the scanned document as received, mark eligibility as complete and override task configuration during scanning.
4. Create a web service call in which the imaging system requests the following security driven options in CalSAWS by sending the Active Directory User Name.
    - Task Override
    - Person Override
    - No Change SAR7
5. Perform Integration Testing with the interface partner.

Table 1 – Get Override Flags Request Parameters

Get Override Flags – REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
userName	String (40 char. Limit)	Active Directory User Name of user who has logged into the Imaging System. Table name is 'Staff' and column name is 'ACTIVE_DIR_USER_NAME' in Active Directory.	Y

Table 2 – Get Override Flags Response Parameters

Get Override Flags – RESPONSE			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
responseCode	HTTP Response Code: 200	Return HTTP response code 200 if the call was completed successfully.	Y
taskOverride	Boolean	Boolean value of Imaging No Task Creation Override Security Right. Return 'true' if the Active Directory User Name in the request has the appropriate Imaging No Task Creation Override Security Right. Return 'false' if otherwise.	Y
personOverride	Boolean	Boolean value of Imaging Person Scope Override Security Right. Return 'true' if the Active Directory User Name in the request has the	Y

		appropriate Imaging Person Scope Override Security Right. Return 'false' if otherwise.	
noChangeSar7	Boolean	Boolean value of Imaging Override No Change SAR7 QR7 Security Right. Return 'true' if the Active Directory User Name in the request has the appropriate Imaging Override No Change SAR7 QR7 Security Right. Return 'false' if otherwise.	Y

Table 3 – Get Override Flags – FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			
400	responseCode	400	Return HTTP response code 400 if there is a tech failure because the required data attribute was not supplied.
	errorMessage	"${Field Name} Must Be Supplied."	

404	responseCode	404	Return HTTP response code 404 if the required data attribute cannot be found in the CalSAWS System.
	errorMessage	"${Field Name} Not Found."	
422	responseCode	422	Return HTTP response code 422 if there is a problem with the request for the required data attribute and the Integration Server is unable to process it.
	errorMessage	"${Field Name} Is an Unprocessable Entity."	
500	responseCode	500	Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.
	errorMessage	"Internal Server Error."	

2.2.3 Execution Frequency

This web service is invoked real-time when the user logs into the Imaging System.

2.2.4 Key Scheduling Dependencies

N/A – Real Time Interface

2.2.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.2.6 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
ImagingNoTaskCreationOverride	Allows the imaging worker to override task generation during scanning.	Imaging No Task Creation Override
ImagingPersonScopeOverride	Allows the imaging worker to default all person level documents to case level documents during scanning.	Imaging Person Scope Override
ImagingOverrideNoChangeSAR7QR7	Allows the imaging worker to mark the scanned document as received, mark eligibility as complete and ignore task configuration during scanning.	Imaging Override No Change SAR7 QR7

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Imaging No Task Creation Override	Allows the imaging worker to override task generation during scanning.	System Administrator

Imaging Person Scope Override	Allows the imaging worker to default all person level documents to case level documents during scanning.	System Administrator
Imaging Override No Change SAR7 QR7	Allows the imaging worker to mark the scanned document as received, mark eligibility as complete and ignore task configuration during scanning.	System Administrator

2.2.7 Data Volume/Performance

N/A

2.2.8 Interface Partner

CalSAWS Imaging Solution

2.2.9 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.3 Get Form Info Inbound Web Service

2.3.1 Overview

Create a Get Form Info Web Service in which the Imaging System will make a generic request to CalSAWS to receive document info of all document types daily.

2.3.2 Description of Change

1. Remove and add the following entries from and to the DOC_TEMPL_IMG table (reference the "Imaging Form Name 7.23.20.xlsx" spreadsheet):
    - Remove entries with the form numbers:
        a. IMG 201

   b. Returned mail
- Add entries with the form numbers:
   a. IMG 655
   b. IMG 656
   c. Returned Mail
   d. IMG 661

2. Complete a CTCR to add the following Imaging Type Descriptions in the CT table for CalSAWS Imaging Type Codes where category ID is 10602 (reference the "Imaging Form Name 7.23.20 Comments.xlsx" spreadsheet):
   - Lobby/Kiosk – Other
   - Self-Service – Other
3. Create a web service in which the Imaging System will make a generic request to CalSAWS for the following information:
   - Form Name
   - Form Number
   - Document Type
   - Time Sensitive Flag
4. Perform Integration Testing with the interface partner.

Table 1 – Get Form Info Request Parameters

Get Form Info – REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
No parameters are required in this request.			

Table 2 – Get Form Info Response Parameters

Get Form Info – RESPONSE			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
This web service requests CalSAWS to provide the Imaging System all Form information, which includes Form Names, Form Numbers and Document Types, for all system-generated and Imaging-exclusive documents. In other words, send the Imaging System the entire repository of Form Name, Form Number and Document Type mappings.			
responseCode	HTTP Response Code: 200	Return HTTP response code 200 if the call was completed successfully.	Y
formName	String (40 char. Limit)	1) For CalSAWS system-generated documents, Form Name will be found in the 'Imaging Form	Y

		Name' column of the DOC_TEMPL table. 2) For Imaging-exclusive documents, Form Name will be found in the 'Imaging Form Name' column of the new Static Table for the CalSAWS Imaging System Document Types and Short Names.	
formNumber	String (20 char. Limit)	1) For CalSAWS system-generated documents, Form Number will be found in the DOC_TEMPL record. 2) For Imaging-exclusive documents, Form Number will be found in the 'Imaging Form Number' column of the new Static Table for the CalSAWS Imaging System Document Types and Short Names.	Y
documentType	String (40 char. Limit)	1) For CalSAWS system-generated documents, Document Type is listed in the new CalSAWS Imaging Type Code Category table, which is associated to the IMG_TYPE column in the DOC_TEMPL table. 2) For Imaging-exclusive documents, Document Type is listed in the new CalSAWS Imaging Type Code Category Table, which is associated to the IMG_TYPE column in the new Static Table for the CalSAWS Imaging System Document Types and Short Names.	Y

timeSensitive	Boolean	Time sensitive status of document in CalSAWS. Return 'True' if it is a tracked document through customer reporting and needs to be returned timely. Return 'False' if otherwise.	Y

Table 3 – Get Form Info - FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			
500	responseCode	500	Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.
	errorMessage	"Internal Server Error."	

2.3.3 Execution Frequency

This web service will be executed daily in the Imaging System.

2.3.4 Key Scheduling Dependencies

N/A [This web service is scheduled by the Imaging System. The Imaging System will invoke this web service daily where they will send the entire repository of Form Name, Form Number and Document Type Mappings in CalSAWS. There is neither an event nor scenario that triggers this web service.]

2.3.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.3.6 Data Volume/Performance

2,000 records will be processed per execution of web service.

2.3.7 Interface Partner

CalSAWS Imaging Solution

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

3 SUPPORTING DOCUMENTS

[This section should include any supporting documents for the design as imbedded documents. Some examples of supporting documents include the Security Matrix, Form Design Documents, NOA Design Documents, and ETL Source-to-Target Mappings.]

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	Security Matrix
2	Imaging	Imaging Form Name 7.23.20 Comments	Imaging Form Name 7.23.20 Comments

4 REQUIREMENTS

[Document what requirements are being addressed with this design and how they are being met]

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2199	The CONTRACTOR shall configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to do the following:1) Automatically categorize all system generated documents.2) Automatically categorize up to 70 person level/verification documents.3) Read the form number from a specified location on the document(s) to be determined during detailed design.4) Capture the Form Name, Form Number, Case Name, Case Number, and Document Type as key metadata.4a) Documents with no case number are automatically sent to a quality assurance queue for review. 5) Compare the confidence score of all	None	This design creates a Get Person Info Web Service, in which the Imaging System requests Person information by sending the 'Case UID' or 'Case Number' and 'County Code' to CalSAWS.

	automatically categorized documents to a confidence threshold.5a) All scanned documents that do not meet the categorization confidence threshold are sent to a quality assurance queue for review. All cases associated the document that does not meet the confidence thresholds will be sent to a quality assurance queue for review.6) Designated staff to be prompted to select case member, multiple persons, or no person option for all person level document types which will be determined during detailed design.		
DDID 2523	The CONTRACTOR shall provide configurable security rights that are maintained by county local security administrators within the CalSAWS Software with the following:1) CalSAWS Software security rights will update the imaging solution during a nightly batch process2) The No Change SAR7/QR7 override option will only be available to counties that have opted into this functionality3) Up to 120 individual security rights will be provided as a part of the imaging solution	None	1. This design adds the Imaging No Task Creation Override Security Right to CalSAWS. 2. This design adds the Imaging Person Scope Override Security Right to CalSAWS. 3. This design adds the Imaging Override No Change SAR7 QR7 Security Right to CalSAWS.
DDID 2500	Configure the imaging solution to have the following security driven options at the point of scanning:	None	This design creates a Get Override Flags Web Service, in which the Imaging System

	2. Task Override: Will ignore task configuration, no task will be created 3. Program Selection: Will define which worker is tasked (the list is pre-defined based on the case information and is available in single case mode or when a coversheet is used in batch mode) 4. No Change SAR7/QR7: Will prompt the CalSAWS Software to do the following: a. Mark the document as received b. Mark Eligibility as complete c. Ignore task configuration, no task will be created 5. Person Override: Will default person level documents as case level documents. 6. Confidential: Will allow designated staff to scan to confidential cases		makes a request for security driven options associated to the user logged into the Imaging System by sending the Active Directory User Name to CalSAWS.
DDID 2198	The CONTRACTOR shall configure the core capture and indexing scan modes (Single Case, Virtual Print, and Multi-case) to perform the following functions when a system generated barcode is recognized by the imaging solution: 1) Perform a CalSAWS	None	This design creates a Get Form Info Web Service, in which the Imaging System requests all CalSAWS system-generated and Imaging-exclusive form information.

	Software lookup of Form Name, Form Number, Case Name, Case Number, and Document Type2) Check the barcode against the case information entered during the scan mode 2a) Not applicable to multi-case scan mode3) If the document is time sensitive (tracked), mark the document as received in the CalSAWS Software3a) If the barcode is not recognized, time sensitive (tracked) documents are reviewed by designated staff to confirm the barcode		

5 MIGRATION IMPACTS

[Document any migration impacts such as data model or potential business process changes]

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 APPENDIX

[Include any supplementary items that my not fit in the Description section. Examples could include flow charts, lengthy code tables, etc.…]

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-214062

CalSAWS Security Batches to Hyland

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jennifer Kim
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/16/20	1.0	Initial Draft	Jennifer Kim
12/11/2020	1.5	Content Revision: 2.2 Add County Context on Case Summary page Imaging buttons 2.5 Added an ImageNow security cleanup	Gillian Noelle Bendicio
12/17/2020	2.0	Content Revision: • Added in Section 2.2 to reference the Appendix section for scenario examples. • Added to the Appendix section scenario examples for the new requirement for Section 2.0 • Create the new User Security Rights Outbound Web Service to successfully update user security rights in the imaging system. • Create an hourly batch job to synchronize user security rights in the imaging system with changes made in the CalSAWS System. • Add a new Column to the OFFICE table to track if an office is Imaging Enabled.	Erika Kusnadi-Cerezo Dana Petersen

Table of Contents

1 OVERVIEW

This SCR will synchronize user security rights in the CalSAWS Imaging System with updates made in CalSAWS via a new hourly batch job.

1.1 Current Design

1. The CalSAWS System does not have all the new security rights and groups for the new imaging system.
2. The CalSAWS System allows the imaging buttons to be accessible if the user is logged-in to a Hyland county.
3. The CalSAWS System does not have an outbound web service to update user security rights in the new imaging system.
4. Currently, there is no hourly batch job that updates user security rights in the new imaging system.
5. CalSAWS does not designate offices as Imaging Enabled.
6. There are ImageNow security groups and rights in the database.

1.2 Requests

1. Edit and add existing and new imaging security rights and groups in the CalSAWS System.
2. Limit the imaging buttons on the Case Summary page to the county that the user is accessing.
3. Create a new outbound web service to update user security rights in the new imaging system.
4. Create a new hourly batch job to synchronize user security rights in the imaging system with updates made in CalSAWS.
5. Update the CalSAWS Data Model to allow the system to track if an office is Imaging Enabled.
6. Delete the existing ImageNow securities in the database.

1.3 Overview of Recommendations

1. Edit and add existing and new imaging security rights and groups in the CalSAWS System.
2. Update the imaging buttons added to the Case Summary page to have county context.
3. Create the new User Security Rights Outbound Web Service to successfully update user security rights in the imaging system.
4. Create an hourly batch job to synchronize user security rights in the imaging system with changes made in the CalSAWS System.
5. Add a new Column to the OFFICE table to track if an office is Imaging Enabled.
6. Delete all existing ImageNow security groups and rights that will be obsolete when the C-IV counties migrate to the Hyland solution.

1.4 Assumptions

1. Updated user security rights via the hourly batch job are not reflected in the CalSAWS Imaging System until the CalSAWS user's next login.
2. The terms "Hyland", "CalSAWS Imaging System", and "imaging system" are used interchangeably.

2 RECOMMENDATIONS

2.1 Edit and Add Existing and New Imaging Security Rights

2.1.1 Overview

Currently, the CalSAWS System does not have all the new security rights and groups for the new CalSAWS Imaging System. This SCR will add and edit new and existing security rights and groups respectively in CalSAWS.

2.1.2 Mockup

No Mockups Applicable.

2.1.3 Description of Changes

1. Imaging Security Rights and Groups – Add the new security rights and groups found in the 'Security Matrix.xlsx' attachment as listed in the Supporting Documents section of the design document.
2. If the existing security right, group and role mappings; naming conventions; and descriptions in CalSAWS differ from those in the security matrix, update the existing ones to reflect those in the security matrix as listed in the Supporting Documents section of the design document.

2.1.4 Page Location

Not Applicable.

2.1.5 Security Updates

For security updates, please refer to the 'Security Matrix.xlsx' attachment as listed in the Supporting Document section of the design document.

2.1.6 Page Mapping

No Page Mapping applicable.

2.1.7 Page Usage/Data Volume Impacts

There are no performance concerns with this update.

2.2 Case Summary Page

2.2.1 Overview

CA-214030, CA-214031, and CA-214038 have added the 'Capture', "Generate Coversheet', and 'Images' buttons to the Case Summary page. These buttons display when the user accessing the page belongs to a Hyland county. This SCR will update those buttons to display only when the case is in the same Hyland county as the user.

2.2.2 Mockup

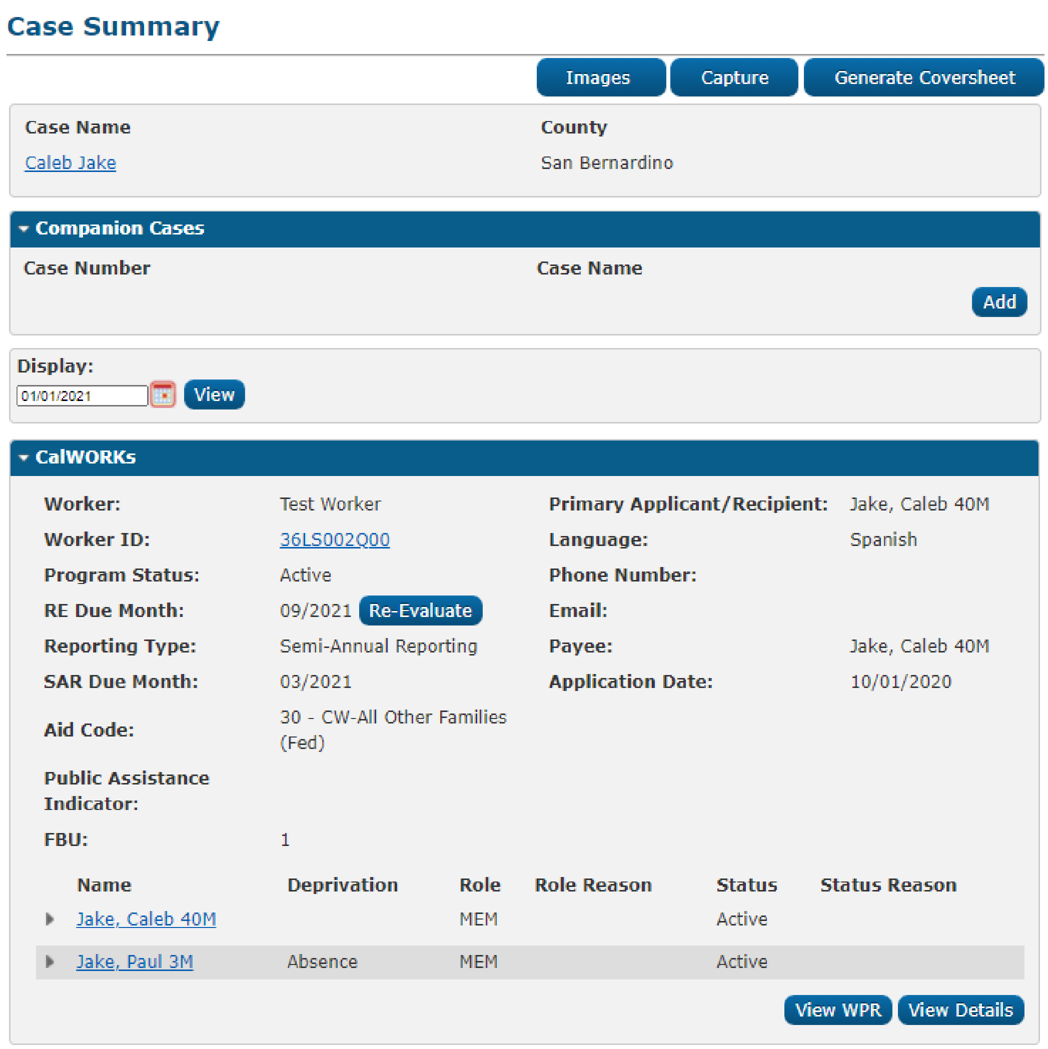


Figure 2.2.1 – Case Summary Page with worker and case in the same Hyland county

2.2.3 Description of Changes

1. Update the following buttons to display only when the user accessing the Case Summary page is within the context of the same county as the case and it is a Hyland county (please reference the Appendix section for examples):
    a. Images
    b. Capture
    c. Generate Coversheet

2.2.4 Page Location

- **Global – Case Info**
- **Local – Case Summary**
- **Task – Case Summary**

2.2.5 Security Updates

Not applicable.

2.2.6 Page Mapping

No Page Mapping applicable.

2.2.7 Page Usage/Data Volume Impacts

There are no performance concerns with this update.

2.3 User Security Rights Outbound Web Service

2.3.1 Overview

This section of the SCR will create the User Security Rights Outbound Web Service to successfully update user security rights in the CalSAWS Imaging System.

2.3.2 Description of Change

1. Create the User Security Rights Outbound Web Service to successfully update user security rights in the imaging system.
2. Send all required data attributes listed in the table "User Security Rights Request Parameters" below. Sending the correct data attributes will allow the User Security Rights Outbound API to handle and implement the following logic in its web service to successfully update user security rights in the imaging system:
    a. Adding a new user in the imaging system if needed.

b. Adding and/or removing a user's Hyland Group Permission Name(s) in the imaging system if needed.
c. Updating the following user attributes as needed:
    i. Staff First Name
    ii. Staff Last Name

Table 1 – User Security Rights Request Parameters

User Security Rights - REQUEST			
FIELD NAME	**TYPE**	**COMMENTS**	**REQUIRED**
userName	String (40 Char. Limit)	Active Directory Username. Table name is 'Staff' and column name is 'ACTIVE_DIR_USER_NAME' in Active Directory.	Y
firstName	String (64 Char. Limit)	First name of user.	N
lastName	String (64 Char. Limit)	Last name of user.	N
primaryEmail	String	Primary email of user.	N
hylandGroupPermissionName	List	The Hyland Group Permission Name (refer to the attached supporting document CalSAWS-Hyland Security Mappings.xlsx).	N

Table 2 – User Security Rights Web Service - FAILED WEB SERVICE OPERATIONS

HTTP Response Code	Field Name	Value	COMMENTS
Error codes are intended for backend processes and will not be displayed for end-users.			

400	responseCode	400	Return HTTP response code 400 if there is a tech failure because the required data attribute was not supplied.
	errorMessage	"${Field Name} Must Be Supplied."	
404	responseCode	404	Return HTTP response code 404 if the required data attribute cannot be found in the CalSAWS System.
	errorMessage	"${Field Name} Not Found."	
422	responseCode	422	Return HTTP response code 422 if there is a problem with the request for the required data attribute and the Integration Server is unable to process it.
	errorMessage	"${Field Name} Is an Unprocessable Entity."	

<table>
<tr><td rowspan="2">500</td><td>responseCode</td><td>500</td><td rowspan="2">Return HTTP response code 500 if there is an unknown internal server error that occurred while trying to process the request.</td></tr>
<tr><td>errorMessage</td><td>“Internal Server Error.”</td></tr>
</table>

2.3.3 Execution Frequency

The web service is available to be invoked in real-time.

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.3.6 Data Volume/Performance

N/A

2.3.7 Interface Partner

CalSAWS Imaging System.

2.3.8 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.4 User Security Rights Batch Job

2.4.1 Overview

The new User Security Rights Batch Job is responsible for updating user security rights in the CalSAWS Imaging System when users have had their imaging rights, login status, office IDs, county code, first name or last name added, removed or modified in CalSAWS.

2.4.2 Description of Change

1. Create a new Category entry to represent the attached supporting document "CalSAWS-Hyland Security Mappings.xlsx". This category will map the Hyland Group Permission Names with their counterpart CalSAWS Security Right. This new category will be leveraged by the new User Security Rights Batch Job's internal logic to provide the User Security Rights Outbound Web Service with the Hyland Security Group Permission Names.
2. Create a Database Change Request (DBCR) to add a new 'Imaging Enabled' column to the OFFICE table. This column will capture if an office is configured with the CalSAWS Imaging Solution, 'Y' for Yes and 'N' for No. Default the value to 'Y' for all existing offices. A subsequent CRFI will confirm the offices within each county that will later be changed to 'N' for any offices identified as not being Imaging-enabled.
3. Create a new table "IMG_RIGHTS_OLD. Note: ALL new table names are for descriptive purposes only. The actual table names within CalSAWS is subject to implementation requirements. This table will serve as the basis of comparison of the user's Hyland Group Permission Names and other tracked configurations between one execution of the User Security Rights Batch Job and the next. This table will represent the previous state of all users in CalSAWS that had imaging security rights as of the last completion of the batch job. This table will contain the following data elements:
    a. Staff Active Directory Username
    b. Hyland Group Permission Name (refer to the attached supporting document CalSAWS-Hyland Security Mappings.xlsx).
    c. Staff First Name
    d. Staff Last Name
4. Create a new table called IMG_RIGHTS_CURRENT. This table will represent the current state of all users in CalSAWS that have imaging security rights as of the current system date and time. This table will contain the following data elements:
    a. Staff Active Directory Username
    b. Hyland Group Permission Name (refer to the attached supporting document CalSAWS-Hyland Security Mappings.xlsx)
    c. Staff First Name

    d. Staff Last Name
5. Create a new table called IMG_RIGHTS_TRANSACT. This table will represent the CalSAWS users for which the Hyland Group Permission Name, first name or last name have been added, removed or modified since the last completion of the batch job. This table will contain the following data elements:
    a. Staff Active Directory Username
    b. Record Created Date- this field will be populated in order to determine which execution of the batch job inserted this record into the staging table in case the record is not processed successfully, and the same user is triggered by subsequent executions of the batch job.
6. Create a new table called IMG_RIGHTS_ERROR_LOG. This table will represent any staff records that were not successfully processed completely to the imaging system. This table will contain the following data elements:
    a. Staff Active Directory Username
    b. Timestamp
    c. Hyland Group Permission Name (refer to the attached supporting document CalSAWS-Hyland Security Mappings.xlsx)
    d. Staff First Name
    e. Staff Last Name
    f. Error Code
    g. Comments
7. Create a new batch job that triggers the User Security Rights Outbound Web Service on an hourly basis, specifically for users who have had their Hyland Group Permission Name, first name and last name added, removed or modified since the last completion of this job:
    a. Perform a check to confirm that the previous execution of this batch process has completed and not currently running. IF the previous process(es) are still executing, cancel this job and downstream thread jobs. This process should not overlap with existing executions.
    b. Refer to the 'Security Matrix.xlsx' document to observe the full list of newly added CalSAWS Imaging Rights.
    c. Query the CalSAWS Security Rights and Staff Data Model. For each staff record that has at least one imaging security right, an 'Active' login status and at least one current position assignment, populate the IMG_RIGHTS_CURRENT table.
    d. Reference the new CalSAWS-Hyland Security Mappings category. For each CalSAWS Imaging Right assigned to the CalSAWS User, store the corresponding Hyland Group Permission Name.
        i. The Hyland Group Permission Name can have a "scope" of County, Office, or Global:
            1. Global: Store the Imaging System Group Permission Name as-is.

2. County: County-level Group Permissions require a County Code prefix in the imaging system:
    a. If the CalSAWS Imaging Right is NOT associated to a “Regional Call Center Staff” or “Regional Call Center Supervisor” (RCC) role, prepend the Staff User’s Login County Code to the Hyland Group Permission Name.
        i. Example: If the user is from County 36 and the Imaging Right Name is “ImagingSearchCase”, and the Imaging Right is NOT associated to an RCC role, then perform the following steps:
            1. Retrieve the mapped Hyland Group Permission Name that corresponds to the CalSAWS Imaging Right of “ImagingSearchCase” (##_SearchCase)
            2. Replace the placeholder characters ‘##_’ with the staff user’s login County Code (36): 36_SearchCase
            3. NOTE: This process applies to All Counties, including county 90 and 92 users.
    b. If the CalSAWS Imaging Right IS associated to an RCC role, prepend ‘RCC_’ to the Hyland Group Permission Name.
        i. Example: If the user is from County 36 and the Imaging Right Name is “ImagingSearchCase”, and the Imaging Right IS associated to an RCC role, then perform the following steps:
            1. Retrieve the mapped Hyland Group Permission Name that corresponds to the CalSAWS Imaging Right of “ImagingSearchCase” (##_SearchCase).
            2. Replace the placeholder characters ‘##_’ with ‘RCC_’: RCC_SearchCase.
    c. NOTE: If the same CalSAWS Imaging Right Name is associated to the worker via an RCC role AND non-RCC Role (or via a

Group-Right association without a role), both versions of the Hyland Group Permission Name will be sent (i.e. '36_SearchCase' AND 'RCC_SearchCase' will be sent to Hyland).

3. Office: Office-level Group Permissions require a County Code prefix AND an office number postfix in the imaging system:
    a. If the CalSAWS Imaging Right is NOT associated to a "Regional Call Center Staff" or "Regional Call Center Supervisor" (RCC) role AND the Staff User is NOT logging in with a County 90 or 92 user, prepend the Staff User's Login County Code to the Hyland Group Permission Name and postfix the Group Permission Name with each of the Imaging-Enabled office Numbers to which the Staff is assigned. The office level Group Permission Name will repeat for each office to which the user is currently assigned in which the Imaging Enabled value is 'Y' within CalSAWS.
        i. Example: The user is a County 36 User and assigned to 3 offices (Office 01, 02, and 03). Office 03 is NOT enabled for Imaging. The user has a CalSAWS Imaging Security Right of "ImagingOfficePersonSelect" for a non-RCC role, perform the following steps:
            1. Retrieve the mapped Hyland Group Permission Name that corresponds to the CalSAWS Imaging Right of "ImagingOfficePersonSelect" (##_OfficePersonSelect_##)
            2. Replace the placeholder characters '##_' with the Staff User's Login County Code (36): 36_OfficePersonSelect_##
            3. For each Office to which the staff is assigned and the 'Imaging Enabled' value is 'Y', replace the placeholder characters '_##' with the office number. Repeat until each office has a

corresponding Hyland Group Permission Name:

a. 36_OfficePersonSelect_01
b. 36_OfficePersonSelect_02
c. Note that an office-level security right is NOT created for office 03, as that office is not specified as being enabled for Imaging.
d. ~~36_OfficePersonSelect_03~~

b. For Office-level Imaging Rights associated to Non-RCC roles for users logged in to Counties 90 or 92, prepend the appropriate County Code but do NOT append any office numbers. Append an Underscore'_' only.
   i. Example: "##_OfficePersonSelect_##" becomes "90_OfficePersonSelect_" or "92_OfficePersonSelect_".
c. For Office-level Imaging Rights that ARE associated to RCC roles, prepend 'RCC_' to the Hyland Group Permission Name, and leave a trailing Underscore '_', such as "RCC_OfficePersonSelect_".
   i. NOTE: Currently, the "Hyland-CalSAWS Security Mappings.xlsx" spreadsheet does not account for Office-Level Imaging Rights to RCC Roles. However, for future expansion, this logic will be employed to prevent office associations with an RCC-level Role in the imaging system.

e. Compare data from the IMG_RIGHTS_OLD table and the IMG_RIGHTS_CURRENT table to seek detected changes. Populate the IMG_RIGHTS_TRANSACT table for each user that:
   i. Exists in the current data but not the previous data
   ii. Exists in the previous data but not the current data
   iii. Exists in both previous and current data but one or more of the following aggregate data elements are different:
      1. Hyland Group Permission Name
      2. Staff First Name
      3. Staff Last Name

8. Create a new Threaded Batch Process to synchronize user security rights in the imaging system with those in CalSAWS. These threads will run after the IMG_RIGHTS_TRANSACT table has been populated by the above Batch Sweep Job:
    a. For each record in the IMG_RIGHTS_TRANSACT table, invoke the User Security Rights Web Service:
        i. Refer to the "User Security Rights Request Parameters" table in section 2.2 of the design document to provide necessary data elements per the web service specifications.
        ii. For each successful operation, delete the associated staff record from IMG_RIGHTS_TRANSACT.
        iii. If the web service returns an error code, retry up to 2 additional times (for a total of 3 attempts). If unsuccessful for 3 attempts, add the appropriate error code and the statement "MULTIPLE RETRY FAILURES: The record has failed to process for a total of 3 times" in the Error Code and Comments columns of the IMG_RIGHTS_ERROR_LOG Table respectively and remove the associated record from IMG_RIGHTS_TRANSACT.
9. Create a new Post Processing Module to clean up the comparison tables and prepare the state of the tables for the next execution of the sync jobs:
    a. Once the User Security Rights Web Service has been completed for all users and thus, the execution of the batch job completed, perform the following steps to prepare the batch job for its next execution:
        i. Truncate the IMG_RIGHTS_OLD table and repopulate the table with existing data from the IMG_RIGHTS_CURRENT table.
        ii. Truncate the IMG_RIGHTS_CURRENT table.

2.4.3 Execution Frequency

This batch job will run on an hourly basis.

2.4.4 Key Scheduling Dependencies

This batch job has no predecessor or dependencies scheduled to run on an hourly basis.

2.4.5 Counties Impacted

Counties utilizing the CalSAWS Imaging System will be impacted. C-IV, LRS and CalWIN counties will be impacted in phases in that order.

2.4.6 Data Volume/Performance

The anticipated volume of updated user records per hour is unlikely to exceed 1,000 distinct user accounts on average.

There may be some instances in which an unusual volume of changed or added users/rights are detected in CalSAWS. In these cases, it may require more processing time than is provisioned in the hourly window. In these scenarios, prevent the next execution of the job from initiating until the existing process has executed to completion. The next iteration of the process will catch up all users' rights that have been updated in the interim.

2.4.7 Failure Procedure/Operational Instructions

Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc.)

2.5 Security Cleanup – Remove existing ImageNow securities from the database.

2.5.1 Overview

Currently, there are ImageNow security rights and groups that exist in the security tables of the database. Since the C-IV counties who previously used these securities will be moving to Hyland, these ImageNow security records are obsolete. This SCR will do a cleanup for these securities.

2.5.2 Description of Change

1. Remove ImageNow security groups from the roles listed in the 'ImageNow Security List' document found in the Supporting Documents section.
2. Delete the existing ImageNow security rights and groups listed in the 'ImageNow Security List' document found in the Supporting Documents section.

2.5.3 Estimated Number of Records Impacted/Performance

Approximately 70 security records will be updated/deleted.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Online Security	This supporting document defines the roles, rights and groups for the new imaging system.	Security Matrix.xlsx
2	Online Security	This supporting document complements the Security Matrix listed right above. This document clarifies the county, office and global scope of the new imaging security rights.	CalSAWS-Hyland Security Mappings.xlsx
3	Online Security	This supporting document list all existing ImageNow security records and roles tied to them.	ImageNow Security List.xlsx

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
2523	CalSAWS software security rights will update the imaging solution during a nightly batch process.	None	1. Edit and add existing and new imaging security rights and groups to the CalSAWS System. 2. Provide the required fields for the User Security Rights Web Service to successfully update user security rights in the imaging system. 3. Create an hourly batch job to ensure user security rights in the CalSAWS Imaging System are in sync with those in the CalSAWS System.

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
CA-214062	Security	Counties will need equivalent Imaging security groups when they migrate over to the Hyland solution.	Conversion Impact		Yes

6 OUTREACH

6.1 Lists

[Include a summary of the list(s). If there is more than one list, separate them with a numbered list and include the Location and Standard Columns only once in the overall summary.]

List Name: <List Name>
List Criteria: <Describe criteria for generating list>
Standard Columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker

Additional Column(s): <list additional columns, if any>
Frequency: <One-time, monthly, quarterly, etc.>

The list will be posted to the following locations:

System	Path
CalSAWS	CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CA-XXXXXX
C-IV	CalSAWS Web Portal>System Changes>SCR and SIR Lists>YYYY>CIV-XXXXXX

7 APPENDIX

Scenario Examples for when the Images, Capture, Generate Coversheet buttons should/should not display on the Case Summary Page.

Note: All other requirements still apply for the Images button, Capture button and Generate Coversheet button to display on the Case Summary page.

Example	Scenario	Expected Outcome
Example #1	A San Bernardino Worker is logged in to CalSAWS and in the context of San Bernardino County.	• When reviewing a Case that belongs in San Bernardino on the Case Summary Page, the Images button, Capture button, and Generate Coversheet button will display. • When reviewing a Case that belongs in Los Angeles on the Case Summary page, the Images button, Capture button and Generate Coversheet button will not display. • When reviewing a Case that belongs in Riverside on the Case Summary page, the Images button, Capture button and Generate Coversheet button will not display.
Example #2	Scenario 1 A user is assigned to a Regional Call Center (RCC) role only and their home County is San Bernardino. Logged in to CalSAWS and working in the context of San Bernardino County. Scenario 2 The same user as in Scenario 1 then updated the context of the County they are working by going to the CalSAWS Homepage and changing the County Drop Down field to Riverside. This will then change that RCC worker to be working in the context of Riverside County.	Scenario 1 • When reviewing a Case that belongs in San Bernardino on the Case Summary Page, the Images button will display. • When reviewing a Case that belongs in Los Angeles on the Case Summary page, the Images button will not display. • When reviewing a Case that belongs in Riverside on the Case Summary page, the Images button will not display. Scenario 2 • When reviewing a Case that belongs in San Bernardino on the Case Summary Page, the Images button will not display. • When reviewing a Case that belongs in Los Angeles on the Case Summary page, the Images button will not display.

	Note: For this specific example, the Capture Button and the Generate Coversheet Button will not display. The Capture button and the Generate Coversheet button are protected by the ImagingCapture Security Right and Regional Call Center (RCC) roles are not assigned the ImagingCapture Security right.	• When reviewing a Case that belongs in Riverside on the Case Summary page, the Images button will display.
Example #3	Scenario 1 A user is assigned to a Regional Call Center (RCC) role and Eligibility Staff and their home County is San Bernardino. Logged in to CalSAWS and working in the context of San Bernardino County. Note: ImagingCapture Security Right is not assigned to any of the Regional Call Center (RCC) roles. For this reason, the Capture button and the Generate Coversheet button will not display in this scenario (The Capture button and Generate Coversheet button are protected by the ImagingCapture security right). Scenario 2 The same user as in Scenario 1 then updated the context of the County they are working by going to the CalSAWS Homepage and changing the County Drop Down field to Riverside. This will then change that RCC worker to be working in the context of Riverside County.	Scenario 1 • When reviewing a Case that belongs in San Bernardino on the Case Summary Page, the Images button, Capture button and Generate Coversheet will display. Note: The Capture button and Generate Coversheet button display in this example (compare to Example #2) because the ImagingCapture security right is assigned to the Eligibility Staff role. • When reviewing a Case that belongs in Los Angeles on the Case Summary page, the Images button will not display. • When reviewing a Case that belongs in Riverside on the Case Summary page, the Images button, Capture Button and Generate Coversheet will not display. Scenario 2 • When reviewing a Case that belongs in San Bernardino on the Case Summary Page, the Images button will not display. • When reviewing a Case that belongs in Los Angeles on the Case Summary page, the Images button will not display. • When reviewing a Case that belongs in Riverside on the Case Summary page, the Images button will display, but the Capture button and Generate Coversheet button will not display.

		Note: When the user changed the context of the County from the CalSAWS homepage from San Bernardino to Riverside, the users will now only have RCC role security when working under the context of Riverside County. For this reason, the Capture button and the Generate Coversheet button will not display (this is due to the ImagingCapture security right is not assigned to RCC roles).
Example #4	A Los Angeles Worker is logged in to CalSAWS and working in the context of Los Angeles County.	• When reviewing a Case that belongs in San Bernardino on the Case Summary Page, the Images button, Capture button, and Generate Coversheet button will not display. • When reviewing a Case that belongs in Los Angeles on the Case Summary page, the Images button, Capture button and Generate Coversheet button will not display. Note: This is an example of where Los Angeles County is not on the Hyland Imaging Solution.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216057 | DDID 1039

Update Enclosure Approval Functionality

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Rainier Dela Cruz
	Reviewed By	Amy Gill

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/11/2020	1.0	Initial Revision	Rainier Dela Cruz
10/20/2020	1.1	Updates based on QA comments	Rainier Dela Cruz
12/09/2020	1.2	Updated the name of the new enclosure email distribution group based on feedback from Tech Support. Updated the mockup to show 'Pending' status, instead of 'Active'. Update the list of forms in the dropdown for Los Angeles County.	Rainier Dela Cruz
12/15/2020	1.3	Updated the 'From' email address.	Rainier Dela Cruz
12/28/2020	1.4	Updated to add updates to the Bundler Job.	Rainier Dela Cruz

Table of Contents

1 OVERVIEW

1.1 Current Design

Currently in C-IV, counties can add a mailing enclosure to the SAR 7/SAR 2 or the ADM 101. The enclosure is inserted into the same envelope as the SAR 7/SAR 2 or the ADM 101 at the Print Center when the form is mailed out. An enclosure can be added by using the ‘Document Enclosure Detail’ page, however, it must be approved before the Print Center can include it. Once the county has uploaded the enclosure from the ‘Document Enclosure’ page, an enclosure request is sent to the C-IV project and a C-IV enclosure reviewer will review the enclosure to confirm it is compliant with standards. If it is not compliant, the enclosure will be rejected. If it is compliant, it will be approved, and the enclosure will be included at the Print Center for the effective dates listed in the ‘Document Enclosure’ page.

In CalSAWS, the enclosure approval process does not exist. When an enclosure is added from the ‘Document Enclosure’ page, the initial status is ‘Approved’, unlike C-IV, where the initial status is ‘Pending’.

1.2 Requests

Update the enclosure functionality in CalSAWS to add the approval process from C-IV.

1.3 Overview of Recommendations

1. Create a new enclosure email distribution group for CalSAWS to replace the existing C-IV distribution group (C-IV.Enclosures@C-IV.org).
2. Update the ‘Document Enclosure Detail’ page to set the status to ‘Pending’ when an enclosure is added.
3. Update the ‘Document Enclosure Detail’ page to display a message after an enclosure is created to inform the user a request to review the enclosure has been sent to CalSAWS.
4. Update the ‘Document Enclosure Detail’ page to remove the cost fields under the Estimate section.
5. Update the logic to set the ~~‘From’~~ ‘Cc’ address on the email that is created when the enclosure is approved or denied to the new enclosure distribution group.
6. Update ‘Form Number’ dropdown on the ‘Document Enclosure Detail’ page to populate the list of forms based on the county.
7. Update the Nightly Enclosure Report batch job to use the new enclosure distribution group for the enclosure request email.
8. Update the Monthly Enclosure Report batch job to use the new enclosure distribution group for the email that provides the report of the enclosures created during the month.
9. Add the Enclosure Estimate Materialized View table.
10. Update the Estimator batch job to run for all counties.

1.4 Assumptions

1. The historical enclosure records in C-IV will not be converted over to CalSAWS.
2. In C-IV, the ADM 101 form is selectable from the ‘Form Number’ dropdown on the ‘Document Enclosure Detail’ page. The form will not be available in the dropdown in CalSAWS until the ADM 101-LA is updated to be usable for all counties by **SCR CA-215133**.
3. Medi-Cal Renewal packets will be updated with **SCR CA-216432**.
4. The Document Enclosure pages should not be used until the new print vendor is active.
5. All migration county batch scheduling changes will be addressed by CA-208599, CA-208600, CA-208601, CA-208602, CA-208603, CA-208604, and CA-208605
6. One enclosure will be used for all the CalSAWS supported languages.
7. The ‘From’ email address is defaulted to 'lrsapplication-dev@dpss.lacounty.gov' when sending emails out from CalSAWS. SCR **CA-218806** will update the email address to use the CalSAWS domain.

2 RECOMMENDATIONS

2.1 Create CalSAWS Enclosure Distribution Group

2.1.1 Overview

Create a new enclosure email distribution group for CalSAWS.

2.1.2 Description of Changes

1. Create the following email distribution group: Enclosures@CalSAWS.org.

2.2 Document Enclosure Detail

2.2.1 Overview

Update the Document Enclosure Detail page to set the status to Pending and display a message when an enclosure is created. Update the page to remove the fields relating to cost. Update the 'From' address on the email that is sent when the enclosure is approved or rejected. Update the logic to populate the Form Number dropdown based on the county.

2.2.2 Document Enclosure Detail Mockup

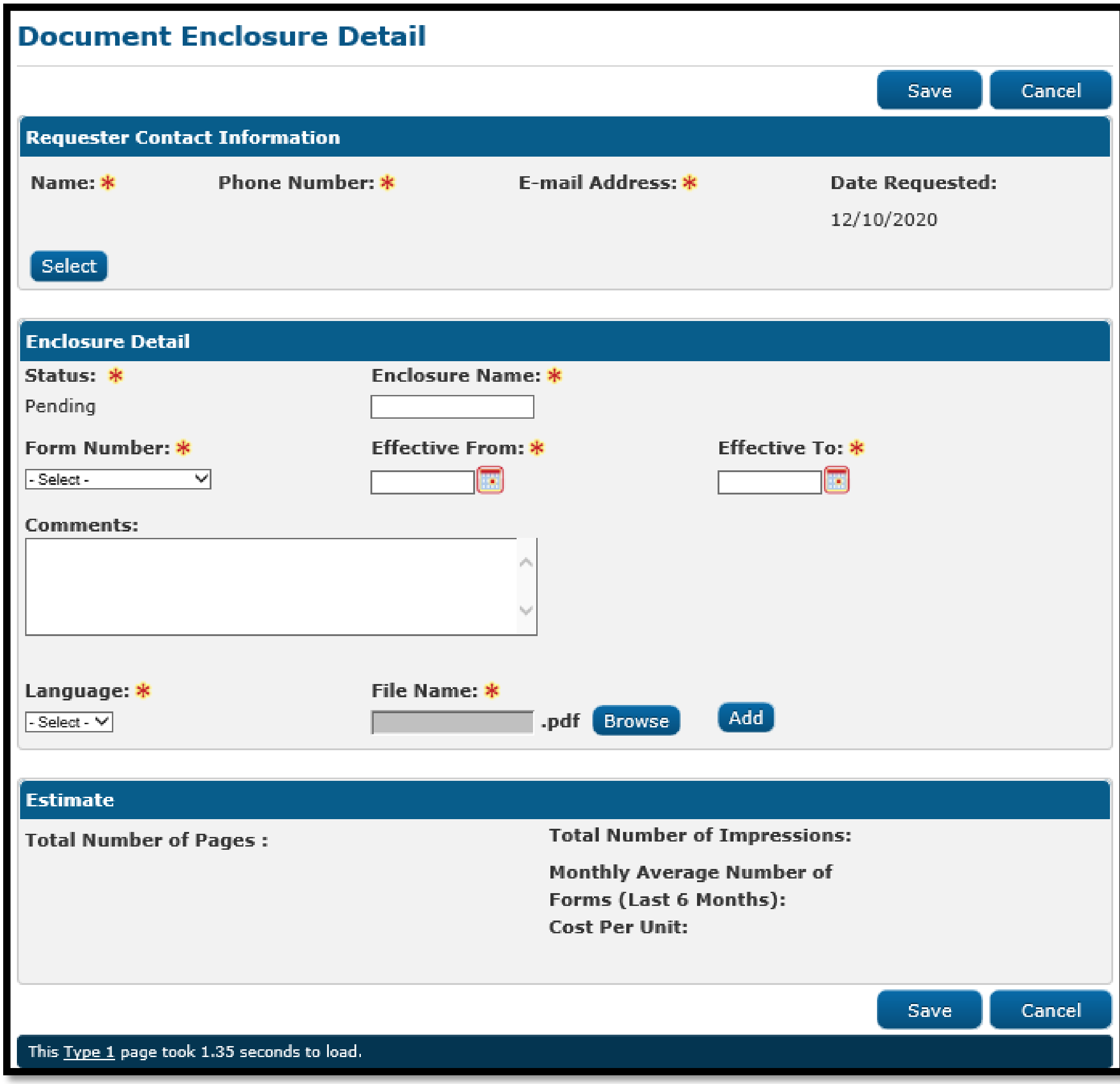


Figure 2.2.1 – Document Enclosure Detail Edit Mode

Figure 2.2.2 – Document Enclosure Detail Message

2.2.3 Description of Changes

1. Update the 'Document Enclosure Detail' page to set the status to 'Pending' when an enclosure is added.

2. Update the 'Document Enclosure Detail' page to display the following message after an enclosure is created and saved: 'This document enclosure request has been sent to CalSAWS for further review. Once this request has been reviewed, CalSAWS will send a confirmation e-mail to the requester's e-mail address. If you have any questions, please contact Enclosures@CalSAWS.org.'

3. Update the email that is created and sent when the 'Approve' or 'Reject' button is clicked.
    a. Update the ~~'From' and~~ 'CC' email address to Enclosures@CalSAWS.org.
    b. Update the subject of the email from 'C-IV Enclosure Notification: Action Taken' to 'CalSAWS Enclosure Notification: Action Taken'.
    c. Update the line in the email from 'If you have any questions, please email C-IV.ENCLOSURES@c-iv.org' to 'If you have any questions, please email Enclosures@CalSAWS.org.'
    d. Update the signature of the email from 'The C-IV Project Team' to 'The CalSAWS Project Team'.

Sent: Monday, August 24, 2020 2:47 PM
To: TestEmail@TestEmail.org
Cc: Enclosures@CalSAWS.org <Enclosures@CalSAWS.org>
Subject: CalSAWS Enclosure Notification: Action Taken

Dear Test Person

The CalFresh Enclosure request you submitted on 08/24/2020 was approved on 08/24/2020. If you have any questions, please email Enclosures@CalSAWS.org.

Sincerely,

The CalSAWS Project Team

Figure 2.2.3 – Example Email

4. Update the 'Document Enclosure Detail' page to remove three fields under the Estimate section.
    a. Remove the following fields:
        i. Cost Per Unit
        ii. Estimated Total Monthly Cost
        iii. Estimated Total Cost
    b. Remove the logic that populates those fields.

5. Update 'Form Number' dropdown to populate the list of forms based on the county.
    a. The list of forms that currently displays in the dropdown will continue to display for Los Angeles County:
        i. SAR 7
        ii. CW/MC Packet – 3A
        iii. CW/MC Packet – 3B
        iv. CW/MC Packet – 3C
        v. CW/CF/MC Packet – 3A
        vi. CW/CF/MC Packet – 3B
        vii. CW/CF/MC Packet – 3C
        viii. CF Packet – LA
        ix. MSP Packet
        x. MC LTC Packet
        xi. MAGI MC Packet
        xii. MC Packet
        xiii. CAPI RD Packet
        xiv. GR AA Packet
        xv. QR7
    b. The following forms will display in the dropdown for the 57 Migration Counties:
        i. SAR 7
        ii. CF RE Packet
        iii. CW RE Packet
        iv. CW/CF RE Packet

2.2.4 Page Location

- **Global: Client Correspondence**
- **Local: Distributed Documents**
- **Task: Enclosure**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

Update the page mapping to remove reference to the Cost Per Unit, Estimated Total Monthly Cost and Estimated Total Cost fields.

2.2.7 Page Usage/Data Volume Impacts

N/A

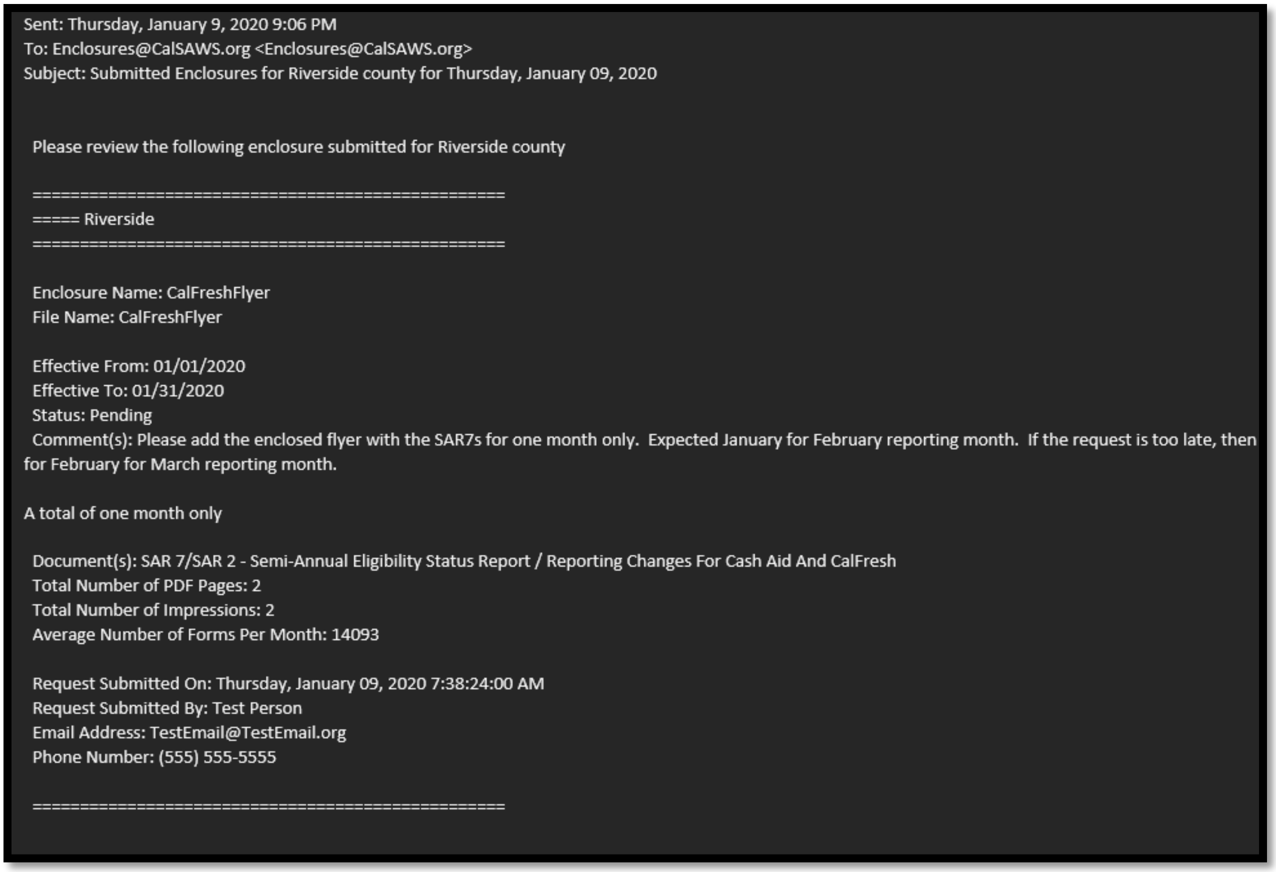
2.3 Nightly Enclosure Report

2.3.1 Overview

The Nightly Enclosure Report batch job (PB00V010) will check if new enclosures were created. It will then email the distribution group to notify them an enclosure was added and request an action be taken (either approving or denying the enclosure). The batch job will be updated to use the new CalSAWS distribution group.

2.3.2 Description of Change

1. Update the logic to set the 'To' email address to new CalSAWS enclosure email distribution group: Enclosures@CalSAWS.org.
2. ~~Update the logic to set the 'From' email address to CalSAWS Correspondence Development Team email distribution group: AppDev.Correspondence.All@CalSAWS.org.~~
3. Remove the following lines from the email:
    a. Unit Cost per Impression
    b. Estimated Monthly Cost
    c. Estimated Total Cost



Sent: Thursday, January 9, 2020 9:06 PM
To: Enclosures@CalSAWS.org <Enclosures@CalSAWS.org>
Subject: Submitted Enclosures for Riverside county for Thursday, January 09, 2020

Please review the following enclosure submitted for Riverside county

==
===== Riverside
==

Enclosure Name: CalFreshFlyer
File Name: CalFreshFlyer

Effective From: 01/01/2020
Effective To: 01/31/2020
Status: Pending
Comment(s): Please add the enclosed flyer with the SAR7s for one month only. Expected January for February reporting month. If the request is too late, then for February for March reporting month.

A total of one month only

Document(s): SAR 7/SAR 2 - Semi-Annual Eligibility Status Report / Reporting Changes For Cash Aid And CalFresh
Total Number of PDF Pages: 2
Total Number of Impressions: 2
Average Number of Forms Per Month: 14093

Request Submitted On: Thursday, January 09, 2020 7:38:24:00 AM
Request Submitted By: Test Person
Email Address: TestEmail@TestEmail.org
Phone Number: (555) 555-5555

==

Figure 2.3.1 – Nightly Enclosure Example Email

4. Update the batch job to run for all counties.

2.3.3 Execution Frequency

N/A

2.3.4 Key Scheduling Dependencies

N/A

2.3.5 Counties Impacted

All counties.

2.3.6 Data Volume/Performance

N/A

2.3.7 Failure Procedure/Operational Instructions

N/A

2.4 Monthly Enclosure Report

2.4.1 Overview

The Monthly Enclosure Report batch job (PB00V011) will generate a report of all the enclosures that were created during the month. The batch job will be updated to send the report to the new CalSAWS distribution group.

2.4.2 Description of Change

1. Update the logic to set the 'To' email address to new CalSAWS enclosure email distribution group: Enclosures@CalSAWS.org.
2. ~~Update the logic to set the 'From' email address to CalSAWS Correspondence Development Team email distribution group: AppDev.Correspondence.All@CalSAWS.org.~~

```
Sent: Saturday, February 1, 2020 9:18 PM
To: Enclosures@CalSAWS.org <Enclosures@CalSAWS.org>
Subject: Actual Bundled Enclosure Count for 01/01/2020

 ==============================================

 County Name: Riverside
 Form Name: SAR 7/SAR 2 - Semi-Annual Eligibility Status Report / Reporting Changes For Cash Aid And CalFresh
 Enclosure Name: CalFreshFlyer
 Form Count: 12769
 Enclosure Pdf Page Count: 2
 Enclosure Impression Count: 2
 Total Impression Count: 25538


 County Name: Riverside
 Form Name: SAR 7/SAR 2 - Semi-Annual Eligibility Status Report / Reporting Changes For Cash Aid And CalFresh
 Enclosure Name: CalFreshFlyer
 Form Count: 15
 Enclosure Pdf Page Count: 2
 Enclosure Impression Count: 2
 Total Impression Count: 30

 ==============================================
```

Figure 2.4.1 – Monthly Enclosure Example Email

3. Update the batch job to run for all counties.

2.4.3 Execution Frequency

No Change.

2.4.4 Key Scheduling Dependencies

N/A

2.4.5 Counties Impacted

All counties.

2.4.6 Data Volume/Performance

N/A

2.4.7 Failure Procedure/Operational Instructions

N/A

2.5 Create the Enclosure Estimate Materialized View Table

2.5.1 Overview

In C-IV, when an enclosure is added, the value that populates the 'Monthly Average Number of Forms (Last 6 Months)' field is retrieved from the Enclosure Estimate Materialized View table. This table does not exist in CalSAWS and will need to be added.

2.5.2 Description of Change

Add the Enclosure Estimate Materialized View table with the following columns:

Column	Value
County Code	The county that generated the form.
Batch Date	The date the Estimator batch job ran.
Document Template Id	The Id of the form in the Document Template table.
Average	The average number of forms generated per month.

Technical Note: Since this table is a materialized view, the columns will match the Enclosure Estimate table.

2.6 Estimator

2.6.1 Overview

The Estimator batch job (PB00V000) will calculate the monthly average count of forms generated with the enclosure in a six-month period. Update the batch job to run for all counties.

2.6.2 Description of Change

1. Update the batch job to run for all counties.
2. Update the batch job to calculate the monthly average count for the forms that are available for that county.

2.6.3 Execution Frequency

No Change.

2.6.4 Key Scheduling Dependencies

N/A

2.6.5 Counties Impacted

All Counties.

2.6.6 Data Volume/Performance

N/A

2.6.7 Failure Procedure/Operational Instructions

N/A

2.7 Bundler

2.7.1 Overview

The Bundler job bundles the enclosure with the form. Update the query that finds the enclosure to only look at the Enclosure and Document Template Enclosure tables.

2.7.2 Description of Change

1. Update the query that finds the enclosure to only look at the Enclosure and Document Template Enclosure tables.

2.7.3 Execution Frequency

No Change.

2.7.4 Key Scheduling Dependencies

N/A

2.7.5 Counties Impacted

All Counties.

2.7.6 Data Volume/Performance

N/A

2.7.7 Failure Procedure/Operational Instructions

N/A

3 REQUIREMENTS

3.1 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
1039	The CONTRACTOR shall consolidate the CalSAWS printing processes to support the utilization of only one set of common print files and print streams for 57 Migration Counties. Los Angeles County will continue their process of using a coversheet and pre-stuffed packets. The print services vendor must have the ability to accept county specific stuffers/mailers/added pages, to be included/stuffed in county mail upon request. The CONTRACTOR shall consolidate the 57 Migration Counties processes for the address placement of flat mail (RE Packets) to support the utilization of only one print vendor. Los Angeles County will continue to use the existing process as mentioned above. The following 3 C-IV RE Packets and generation process will be migrated into the CalSAWS Software for the 57 Migration Counties:	- Adding the forms required for the RE packets is covered with other migration DDIDs. - Consolidating print processes is covered with DDID 1476. - All envelope changes will be covered by M&O. - CalWIN will use the existing C-IV RE packet types, logic and processes. Existing packets will not be modified or new packets created for CalWIN counties. - Existing enclosure functionality will be updated to allow enclosures to be added to more types of forms. - Enclosure functionality will be updated to allow for enclosures to be uploaded/attached by language. - Enclosure functionality will be updated to allow for multiple enclosures to be added a form type.	Migrated the enclosure approval process from C-IV to CalSAWS.

	1) CW/CF RE Packet – CalWORKs / CalFresh RE Packet 2) CW RE Packet – CalWORKs Redetermination Packet 3) CF RE Packet – CalFresh Recertification Packet	- Enclosure approval process will remain in place. - Enclosure estimation logic will need to be updated for the new form types and by language type. - Counties will be able to add forms specific to their county via the enclosure process. Batch properties will have to be updated for each wave.	

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-216739

Medi-Cal Renewals Listing Report

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Ravneet Bhatia; Thao Ta

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
08/31/2020	1.0	Initial Version	Esequiel Herrera-Ortiz
09/08/2020	1.1	Updates made per Build, ST, QA, BA review.	Esequiel Herrera-Ortiz
10/21/2020	2.0	Updated the Renewal Action definition in section 2.1.3.6.e. I removed the Auto Authorized option as this is not possible for delinquent renewals. I also updated the Renewal option description.	Esequiel Herrera-Ortiz

Table of Contents

1 OVERVIEW

The Medi-Cal Renewals Listing Report is a daily scheduled report that captures the latest information of the entire population of cases that have a Medi-Cal RE due. Four versions of the report are generated daily.

Version 1 – Generates for the next RE Due Month.

Version 2 – Generates for the current RE Due Month.

Version 3 – Generates for the prior RE Due Month.

Version 4 – Generates for two months prior RE Due Month.

This document describes the changes that will be made to the existing Medi-Cal Renewals Listing Report in order to aid in the daily process of Medi-Cal line operations workload.

1.1 Current Design

The report population is any Medi-Cal program which has a Medi-Cal renewal (RE) due in a given month, whether (1) the RE was processed or (2) is to be processed through RE packet tracked in LRS or (3) the RE has been Auto-Authorized by an LRS CalHEERS interface batch.

The report does not provide adequate columns needed to assist workers with the daily processing of Medi-Cal renewals and for related Medi-Cal operations.

The report does not provide information on delinquent REs.

1.2 Requests

Update the Medi-Cal Renewals Listing Report to add additional information that will assist line staff in the processing of Medi-Cal renewals. Further, the enhancements will make the report more useful for managers and supervisors, by providing them additional data and timeframes to control the processing of renewals at the office, unit, and worker level. With the proposed recommendations, line staff will be better equipped to identify renewals that have already been dispositioned and renewals that require additional follow-up at any given time.

The report which generates for the current RE Due Month will now include a new sheet which captures delinquent REs.

1.3 Overview of Recommendations

1. Remove the column named 'Office Number' from all sheets. The existing 'Office Name' column is adequate.

2. Add the following columns to the 'Details Report' sheet.
   - Packet Received Date
   - Discontinuance Date
   - Soft Pause
   - Deemed Eligible Child DOB
   - MC 355 Due Date
   - MC 355 Reminder Sent Date
   - MC 355 Status
   - MC 355 Action Date
   - Latest Imaged Document Date

3. Add a new sheet which will capture Delinquent REs for the version of the report that generates for the current RE Due month.

4. Add the Former Foster Youth (FFY) Renewal Packet to the list of Renewal packets captured under the column 'Packet Type'.

5. Update the current logic for the 'Renewal Action' column to include two new options. These two new options were previously captured under 'No Packet':
   - 'No Packet-MSP SSI' if all active program persons are being aided under MSP aid code 80 and all active program persons are receiving SSI. This case requires additional follow-up by eligibility staff.
   - 'No Packet-Aid Code 38' if all active program persons are being aided under aid code 38. This case requires additional follow-up by eligibility staff.

6. Exclude Transitional Medi-Cal (TMC) cases from the listing if the entire household is being aided under TMC.

1.4 Assumptions

1. The report's system logo will be updated during the re-platform effort.

2 RECOMMENDATIONS

2.1 Medi-Cal Renewals Listing Report

2.1.1 Overview

This section will outline only the updates that will be made to the Medi-Cal Renewals Listing Report.

2.1.2 Medi-Cal Renewals Listing Report Mockup

Medi-Cal Renewals Listing Report

Los Angeles
Run Date: AUG-12-20 11:02 PM
Redet Due Month: 09/2020

Summary Report			
Total Cases	1	2	2
Office Name	**Renewals (Mailed Out)**	**No Renewal Packet (Not Mailed Out)**	**Renewals Auto-Authorized**
002 Glendale	1	2	2

*Note the mockup is attached in the Supporting Documents section.

*Note: The production version of the report might have small variances in cosmetics due to the possible need to accommodate data or changes which are introduced by the reporting tool.

2.1.3 Description of Change

1. Update all sheets to exclude programs where every active program person is aided under the Transitional Medi-Cal (TMC) program. This is determined by one of the TMC aid codes.

Code-184	Short Description
39	39 - Initial TMC-Full
3T	3T - Initial TMC-ESO/Pregnancy
59	59 - Continuing TMC-Full

Code-184	Short Description
5T	5T - Continuing TMC-ESO/Pregnancy

2. Include the following renewal packet as a Medi-Cal renewal packet type:

Code-329	Short Description
FY	Former Foster Youth Packet

   This change will be reflective on all sheets when displaying packet related information.

3. Make the following updates to the 'Summary Report' sheet.
   a. Update the header to be in the following format. Currently the header only includes a single line which displays the report title and system logo. This is to make the header on all sheets the same format.

Line	Field Name	Field Description
1	System Logo and Report Title	The system logo followed by the report title. See the attached mockup in the Supporting Documents section for reference.
2	County Name	The county name for which the report was generated for. Format: [County Name]
3	Run Date	The date the report was ran on. Format: Run Date: MON-DD-YY HH:MM AM/PM
4	Redet Due Month	The reporting month the data was captured for. Format: Redet Due Month: MM/YYYY

   b. Remove the 'Office Number' column from the sheet.
   c. Update the 'No Renewal Packet (Not Mailed Out)' count column to include the REs with a Renewal Action of 'No Packet – MSP SSI' and 'No Packet – Aid Code 38'. This update should be reflected in the 'Total Cases' total located above the column.

4. Make the following updates to the 'Office Summary Report' sheet.
   a. Remove the 'Office Number' column from the sheet.
   b. Update the 'Packet Submit Month' column to be formatted in date format rather than character string format. This allows users to use date filters which provides chronological ordering rather

than alphanumerical order. This should also provide filters which are collapsed by year, month and day.
Format: MM/YYYY

c. The existing Renewal Action column will be updated to include two new Renewal Action types: **'No Packet – MSP SSI'** and **'No Packet – Aid Code 38'**. The two new renewals types should be included in the 'Total Cases' total located at the top of the sheet.

Field Name	Field Description
Renewal Action	Displays the renewal action of the program as of the report run date. Values will be one of the following five: • 'Auto-Authorized' – No packet was sent out (there is no packet information available) and the RE Due Date was advanced by e-hit through batch. • **'No Packet - MSP SSI'** – No packet was sent out and all active program persons are being aided under MSP SSI aid code 80 and all active program persons are receiving SSI. • **'No Packet – Aid Code 38'** - No packet was sent out and every active program person is being aided under aid code 38. • 'No Packet' – No packet was sent out for the RE Due month and there was not an e-hit Auto-Authorization and the program does not meet the requirements for 'No Packet – MSP SSI' or 'No Packet – Aid Code 38. • 'Renewal' – There is a RE Due Date in the report month and there is packet information available for the RE Due Date

5. Make the following updates to the 'Details Report' Sheet.
   a. The 'Office Number' column will be removed from the sheet.
   b. The Packet Type column will now include 'Former Foster Youth Packet' as a possible value.
   c. Add the following columns to the sheet.

Field Name	Field Description
Packet Received Date	Displays the latest received date of the renewal packet associated to the RE due month.

	Format: MM/DD/YYYY
Discontinued Effective Date	Displays the effective date of the discontinuance for any discontinuance which is effective. Format: MM/DD/YYYY The field will be blank if the program has not been discontinued or if an approved rescission has been applied to the program.
Discontinued Action Date	Displays the latest action date related to the program's discontinuance or denial. Format: MM/DD/YYYY The field will be blank if the program has not been discontinued / denied or if an approved rescission has been applied to the program.
Soft Pause	Displays 'Y' if any individual in the case is under Soft Pause in the latest Determination of Eligibility Response (DER) else the column will display 'N'. The Soft Pause will only be determined by any DER which has a Benefit Month >= the RE Due Month minus 1 Month. If multiple DERs are found with a Benefit Month >= RE Due Month minus 1 Month, then the one with the greatest created on date will be chosen.
Deemed Eligible Child DOB	Displays the birth date of the youngest active deemed eligible (DE) child on the program. Format: MM/DD/YYYY This field will be blank if the program has no active DE Child.
MC 355 Due Date	Displays the due date of the last generated MC 355 for the program. The report will only search for MC 355s which have a generated date >= RE Due Month minus 2 months. Format: MM/DD/YYYY The field will be blank if no record exists.
MC 355 Reminder Sent Date	Displays the date the latest MC 355 Reminder Notice was sent for the program. The report will only search for MC 355 Reminder Notices which have a generated date >= RE Due Month minus 2 months. Format:

	MM/DD/YYYY The field will be blank if no record exists.
MC 355 Status	Displays the status of the latest MC 355 generated for the program. The report will only search for MC 355s which have a generated date >= RE Due Month minus 2 months. The field will be blank if no record exists. Possible Values (Category 10540): • Pending • Sent • Complete • Incomplete • Not Applicable Note: The above listed are the current possible status values for the MC 355, but the report logic will not restrict the data to these values. If later status is introduced the report will automatically pick up the new value.
MC 355 Action Date	The date the status was applied to the MC 355. The field will be blank if no record exists. Format: MM/DD/YYYY
Latest Imaged Document Date	Displays the most recent date the latest MC 355 or Non-Standard document/verification was imaged. The date will be stored in such a way that it will no longer update if one of the following conditions is true. • The current packet status is 'Complete-EDBC Accepted and the RE Date has advanced • The current packet status is Incomplete, and the document/verification was received more than 100 days from the last day of the RE Due Month. • The current packet status is 'Reviewed-Ready to Run EDBC' and the program Status is Active, or the latest program application event is Discontinued. Format: MM/DD/YYYY The field will be blank if no record exists.

*Technical Note – All date columns should be in date format and can be sorted in chronological order.

d. The following existing columns will be updated all follows:

Field Name	Field Description
Renewal Action	Displays the renewal action of the case as of the report run date. Values will be one of the following five: • Auto-Authorized – No packet was sent out (there is no packet information available) and the RE Due Date was advanced by e-hit through batch. • No Packet - MSP SSI – No packet was sent out and all active program persons are being aided under MSP SSI aid code 80 and all active program persons are receiving SSI. • No Packet – Aid Code 38 - No packet was sent out and every active program person is being aided under aid code 38. • No Packet – No packet was sent out for the RE Due month and there was not an e-hit Auto-Authorization and the program does not meet the requirements for 'No Packet – MSP SSI' or 'No Packet – Aid Code 38. • Renewal – There is a RE Due Date in the report month and there is packet information available for the RE Due Date
Packet Status	Displays the current status of the renewal packet as of when the report was generated. Possible statuses include (Category: 258): • Sent • Received • Incomplete • Reviewed – Ready to Run EDBC • Error • Generated • Complete – EDBC Accepted • Not Applicable Note: The report will not restrict based on these values. If a later customer report status is introduced, the report will automatically display the value.

	If no packet information exists, then the column will reflect the same value as the Renewal Action column. Possible values are: • Auto-Authorized • No Packet - MSP SSI • No Packet – Aid Code 38 No Packet

e. Update the logic for the static 'Total No Packet' total as follows:

Total Field	Field Description
Total No Packet	Total count of all cases that have a Renewal Action of: • No Packet • No Packet - MSP SSI • No Packet – Aid Code 38

6. Create a new sheet titled 'Delinquent REs Report'. See the attached mockup in the supporting documents for reference. The report will have the following characteristics:
   a. The sheet will only be populated and be available when the report is generated for the current RE Due month.
   b. The sheet will have the following header:

Line	Field Name	Field Description
1	System Logo and Report Title	The system logo followed by the report title. See the attached mockup in the Supporting Documents section for reference.
2	County Name	The county name for which the report was generated for. Format: [County Name]
3	Run Date	The date the report was ran on. Format: Run Date: MON-DD-YY HH:MM AM/PM
4	Redet Due Month	The reporting month the data was captured for. Format: Redet Due Month: MM/YYYY

   c. The sheet will capture the following base population:

Program Status	Condition
Active	• Program is Medi-Cal • Program Status is 'Active'

	• RE Due Month is less than The Reporting month.
Pending	• Program is Medi-Cal • Program Status is 'Pending' • RE Due Month is prior to the current report month • Program was Discontinued with a reason is 'Failed to Complete Redetermination' or 'Failed to Complete Determination'.
Discontinued	• Program is Medi-Cal • Program status is 'Discontinued' • RE Due Month is prior to current report month • Program status reason is 'Failed to Complete Redetermination' or 'Failed to Complete Determination' from RE Due Month to 3 Months. • RE Packets status after discontinued event date from RE Due Month to 3 months equals 'Incomplete' **and/or** MC 355 or Non-Standard Document/Verification received after discontinued event date from RE Due Month to 3 months; **or** • RE Packets status after discontinued event date from RE Due Month to 3 months equals 'Received' or 'Reviewed-Ready to Run EDBC'. • **Note:** Discontinued record must no longer be picked up on month 4 after RE Due Month.
Denied	• Program is Medi-Cal • Program status is 'Denied' • RE Due Month is prior to current report month; • Program was Denied from RE Due Month to 3 Months; • Program was previously Discontinued for 'Failed to Complete Redetermination' or 'Failed to Complete Determination' from RE Due Month to 3 months; and

	• RE Packets status after denied event date from RE Due Month to 3 months equals 'Incomplete' **and/or** MC 355 or Non-Standard Document/Verification received after denied event date from RE Due Month to 3 months; **or** • RE Packets status after denied event date from RE Due Month to 3 months equals 'Received' or 'Reviewed-Ready to Run EDBC'. • **Note:** Denied record must no longer be picked up on month 4 after RE Due Month.

d. The sheet will include the following totals at the top of the sheet.

Total Field	Field Description
Total Cases	Count of all cases captured in the sheet.
Total Renewals	Total count of all cases that have a Renewal Action of 'Renewal'.
Total No Packet	Total count of all cases that have a Renewal Action of: • No Packet • No Packet - MSP SSI • No Packet – Aid Code 38
Total Auto-Authorized	Total count of all cases that have a Renewal Action of 'Auto-Authorized'.

e. The sheet will provide the following columns

Field Name	Field Description
Renewal Action	Displays the renewal action of the program as of the report run date. Values will be one of the following five: • 'No Packet - MSP SSI' – No packet was sent out and all active program persons are being aided under MSP SSI aid code 80 and all active program persons are receiving SSI.

	• 'No Packet – Aid Code 38' - No packet was sent out and every active program person is being aided under aid code 38. • 'No Packet' – No packet was sent out for the RE Due month and there was not an e-hit Auto-Authorization and the program does not meet the requirements for 'No Packet – MSP SSI' or 'No Packet – Aid Code 38. • 'Renewal' – There is an outstanding RE for a prior month and there is packet information available for the outstanding RE.
Office Name	The office name associated to the program assigned worker as of the report run date. If no worker is assigned, then the last known worker will be displayed.
Unit	The unit number associated to the program assigned worker as of the report run date. If no worker is assigned, then the last known worker information will used.
Worker ID	The worker ID assigned to the program as of the report run date. If no worker is assigned, then the last known worker information will be used.
Case Name	The case name of the case.
Case Number	The case number of the case.
Primary Lang	The primary language of the primary applicant.
Home Phone	The most recent home phone number of the program person. This column will be blank if no record exists.
Other Phone	The most recent phone number of the program person that is not the Home phone number. This column will be blank if no record exists.
Packet Type	The latest redetermination packet type sent out to the program person. Possible Values: • Former Foster Youth Packet

	• LTC MC RE Packet • MAGI MC Packet • Mixed MC RE Packet • MC 604 IPS Packet • MC RE Packet • MSP Packet • Non-MAGI Screening Packet • Pre-ACA MC RE Packet This column will be blank if no record exists.
Packet Sent Date	Displays earliest date the renewal packet was sent. Format: MM/DD/YYYY This column will be blank if no packet has been sent.
Packet Received Date	Displays the latest received date related to the renewal packet associated to the RE due month. Format: MM/DD/YYYY This column will be blank if no record exists.
Packet Submit Month	Displays the month in which the renewal packet was due to be submitted. Format: MM/YYYY This column will be blank if no record exists.
Packet Status	Displays the current status of the renewal packet as of when the report was generated. Possible statuses include (Category: 258): • Sent • Received • Incomplete • Reviewed – Ready to Run EDBC • Error • Generated • Complete – EDBC Accepted • Not Applicable Note: The report will not restrict based on these values. If a later customer report status is introduced, the report will automatically display the value.

	If no packet information exists, then the column will reflect the same value as the Renewal Action column. Possible values are: • Auto-Authorized • No Packet - MSP SSI • No Packet – Aid Code 38 • No Packet
Packet Status Date	Displays the status date of the Packet Status that is being displayed. This column will be blank if no packet information exists.
Reminder Notice Date	The date the latest reminder was sent to the program person. This column will be blank if no reminder notice was sent.
Current Program Status	The current program status of the program.
Discontinued / Denied Effective Date	Displays the latest effective date related to the program's discontinuance or denial. Format: MM/DD/YYYY The field will be blank if the program has not been discontinued or if an approved rescission has been applied to the program.
Discontinued / Denied Action Date	Displays the latest action date related to the program's discontinuance or denial. Format: MM/DD/YYYY The field will be blank if the program has not been discontinued / denied or if an approved rescission has been applied to the program.
RE Due Month	The RE Due month of the delinquent RE. Format: MM/YYYY
Soft Pause	Displays 'Y' if any individual in the case is under Soft Pause in the latest Determination of Eligibility Response (DER) else the column will display 'N'. The Soft Pause will only be determined by any DER which has a Benefit Month >= the RE Due Month minus 1 Month. If multiple DERs are found with a Benefit Month >= RE Due Month

	minus 1 Month, then the one with the greatest created on date will be chosen.
Deemed Eligible Child DOB	Displays the birth date of the youngest active deemed eligible (DE) child on the program. Format: MM/DD/YYYY This field will be blank if the program has no active DE Child.
MC 355 Due Date	Displays the due date of the last MC 355 generated for the program. which was generated for the program. The report will only search for MC 355s which have a generated date >= RE Due Month minus 2 months. Format: MM/DD/YYYY The field will be blank if no record exists.
MC 355 Reminder Sent Date	Displays the date the latest MC 355 Reminder Notice was sent for the program. The report will only search for MC 355 Reminder Notices which have a generated date >= RE Due Month minus 2 months. Format: MM/DD/YYYY The field will be blank if no record exists.
MC 355 Status	Displays the status of the last MC 355 generated for the program. The report will only search for MC 355s which have a generated date >= RE Due Month minus 2 months. The field will be blank if no record exists. Possible Values (Category 10540): • Pending • Sent • Complete • Incomplete • Not Applicable Note: The above listed are the current possible status values for the MC 355, but the report logic will not restrict the data to these values. If later status is introduced the report will automatically pick up the new value.
MC 355 Action Date	The date the status was applied to the MC 355. The field will be blank if no record exists. Format: MM/DD/YYYY
Latest Imaged Document Date	Displays the most recent date the latest MC 355 or Non-Standard document/verification was imaged. The date will be stored in such a

	way that it will no longer update if one of the following conditions is true. • The current packet status is 'Complete-EDBC Accepted and the RE Date has advanced • The current packet status is Incomplete, and the document/verification was received more than 100 days from the last day of the RE Due Month. • The current packet status is 'Reviewed-Ready to Run EDBC' and the program Status is Active, or the latest program application event is Discontinued. Format: MM/DD/YYYY The field will be blank if no record exists.

2.1.4 Report Location

- **Global: Reports**
- **Local: Scheduled**
- **Task: Case Activity**

2.1.5 Counties Impacted

This report is specific for LA County but can be made available to other counties upon request.

2.1.6 Security Updates

No updates will be made to the report's security.

2.1.7 Report Usage/Performance

The report usage will remain the same.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Medi-Cal Renewals Listing Report Mockup	Medi-Cal Renewals Listing Report Mock

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.24.2.1	LRS shall produce reports daily, weekly, monthly, quarterly, semi-annually, annually, and as needed, as specified by COUNTY.	This report satisfies a need to generate a report in a scheduled manner with information specified by the county.

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
N/A					

6 OUTREACH

N/A

7 APPENDIX

N/A